

**Creating and Managing a
Community Supported Agriculture (CSA)
Program on Your Farm for Direct to Consumer
Sales of Local Farm Products**

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Why Create and Manage a CSA Program?

Why do you want a Community Supported Agriculture Program? Why do you want to serve as a CSA Manager? Are you the owner? Do you work for the owner? What motivates you to do this?

What is the Vision for the CSA Farm? Do you have a heart to serve others by providing healthy local foods?

Can you keep the big picture of the vision in your heart? Don't get lost in the many minute details. Details are what charts and clipboards are for- to make the details "mindless" as we check the boxes.

Analyze your strengths as a manager. There is no such thing as a "perfect" CSA manager. We all have strengths and weaknesses. *Find a partner or assistant with strengths to compensate where you are weak, or hire it out to maintain excellence.*

Where do you lack skill or motivation? If you are not motivated, it will not get done. If you don't like to do it, you WILL procrastinate. Delegate items you are not skilled or motivated to accomplish to people who would be excited to develop a project area for you.

Optimal Manager Behaviors

- Organized, Timely, Productive
- Adaptable, Flexible, Resilient
- Hard working, Dedicated, Self-motivated
- Personable, Polite
- Conscientious, Ethical
- Analytical, Problem solver
- Innovative, Creative
- Detail oriented, Accurate
- Team builder, Positive
- Caring, Customer service oriented, Responsive

General Knowledge and Skills That Are Helpful

- Leadership skills and training skills
- Interpersonal skills
- Time management skills
- Stress management skills
- Problem solving skills
- Computer and software skills
- Marketing skills and awareness
- Plant propagation skills

- Knowledge of agricultural equipment such as tractors, tillers, sprayers, trucks, mowers and maintenance skills
- Knowledge of organic, sustainable farming practices and certification
- Knowledge of legal and policy issues
- Financial management skills and basic economics
- Food safety knowledge
- Knowledge of record keeping requirements
- Knowledge of risk management
- Knowledge of plant pathology
- Knowledge of entomology
- Knowledge of chemical application
- Knowledge of soil science and fertility requirements
- Knowledge of water management principles
- Communication skills of writing, speaking and listening

Forecasted Tools, Equipment, Supplies, and Materials Needed

- Computer and software, cellphone for pictures
- Tractors or Rototillers
- Trucks/wagons/mowers
- Water source
- Cooler system
- Irrigation system
- Harvesting equipment and supplies
- Packing equipment and supplies
- Greenhouse/high tunnels
- Sprayers, Spreaders
- Fertilizers
- Compost facilities
- Seeds/plants/bulbs or tubers
- Basic hand tools and shop tools
- Cultivators
- PPE
- Pesticides

Up Next: Why Choose CSA's Over Other Marketing Channels?

WHY PRIORITIZE CSA PROGRAM MARKETING STRATEGIES?

Determining Your Market Strategies and Needs

Preparing For Marketing:

- See yourself through the eyes of your prospective customers. Your business is what THEY THINK you are selling. Find out what they think. When developing marketing, your focus is customer perception first then product information second.
- Build your story to make an emotional connection, promote a lifestyle choice the customer can relate to. They want to feel good about their buying choices and relate to how they enrich their lives.
- What is meaningful for them? Fresh? Local? Nutrition? Sustainability? Quality? Convenience?
- Speak UP. Don't be passive. Increase the perceived value of your product by explaining benefits not descriptive features. It has been said that features tell but benefits sell.
- Write out a 60 second pitch. Who you are, what you do, product benefits, and who will benefit the most? It will make your marketing pitch concise and make you think about what you are doing.

Common Marketing Channels:

- CSA (Community Supported Agriculture)
- Farmer's Markets
- Farms Stand on Site
- U-Pick Operation
- Restaurants
- Schools/Institutions*
- Wholesale Distributors*
- Grocery Stores*---(* Understand associated compliance regulations)
- Each market has its own elements of pros and cons

Seven Elements to Evaluate for Markets:

- Risks
- Prices/Profit Potential
- Volume Moved
- Level Of Marketing Management Required (data entry, contacts, promotions)
- Associated Costs
- Farmer Stress
- Customer Relationships- (ranges from personal to business only)

Evaluate CSA's:

- Risks: farmer commitment up front, customers share risk, weather

- Prices/Profit Potential: Prices higher than wholesale, overall profit is generally higher
- Volume Moved: high, it is possible to move nearly all product produced
- Level Of Marketing Management Required: High, must sell shares and facilitate weekly pickup. Most shares sold pre-planting, pre-harvest season
- Associated Costs: Seeds, packing material, brochure, advertising, walk-in cooler
- Farmer Stress: Low to medium, must meet customer expectation weekly
- Customer Relationships: personal, repeat customers, opportunity to build loyalty, can educate consumers

Evaluate Farmer's Markets:

- Risks: low customer turn out, price competition, unsold product, weather
- Prices/Profit Potential: prices vary, may be higher in other channels, labor costs higher to staff the booth
- Volume Moved: varies with market, may be low to medium
- Level Of Marketing Management Required: High, many hours invested in selling, most markets run 3-5 hours/day.
- Associated Costs: market fees, booth equipment, travel expense, hired labor
- Farmer Stress: Low, show up or don't show up
- Customer Relationships: personal, repeat customers, opportunity to build loyalty, can educate consumers

Evaluate Farm Stand:

- Risks: low customer turn-out, possible theft with the honor system
- Prices/Profit Potential: Prices vary, location is big factor in profit potential
- Volume Moved: medium to low, location a factor
- Level Of Marketing Management Required: varies from unstaffed honor system to staff supervision. Must advertise somehow.
- Associated Costs: road signs, sales staff, stand, product
- Farmer Stress: varies depending on scale of stand, low to medium
- Customer Relationships: dependent on staff present to have relationship with

Evaluate U-Pick:

- Risks: low customer turn-out, weather, liability of people visiting on farm
- Prices/Profit Potential: high profit potential, location and type of product important
- Volume Moved: medium to low, location a factor, competition a factor
- Level Of Marketing Management Required: varies from unstaffed honor system to staff supervision. Must advertise somehow.
- Associated Costs: road signs, sales staff optional, weigh scales, containers
- Farmer Stress: varies depending on scale of u-pick, low
- Customer Relationships: dependent on staff present to have relationship with

Evaluate Distributors or Hubs:

- Risks: they call the shots, inconsistent orders, buyer back-outs, unsold product
- Prices/Profit Potential: lower, producer takes price offered
- Volume Moved: high potential depending on location and management of hub
- Level Of Marketing Management Required: low, relatively quick once set up, easy for volume sold, must meet packing requirements, and certification
- Associated Costs: washing, cooling packing equipment for high volume, delivery cost, certification
- Farmer Stress: high (see risks)
- Customer Relationships: business only

Evaluate Grocery:

- Risks: they call the shots, inconsistent orders, buyer back-outs, unsold product, delayed payments
- Prices/Profit Potential: lower wholesale, producer takes price offered
- Volume Moved: high to variable
- Level Of Marketing Management Required: low, relatively quick once set up, easy for volume sold, must meet packing requirements and certification
- Associated Costs: washing, cooling packing equipment for high volume, delivery cost
- Farmer Stress: medium to high (see risks)
- Customer Relationships: business only

Evaluate Restaurants:

- Risks: buyer back-out, unpaid invoices with local food start-ups, slow to pay
- Prices/Profit Potential: prices vary, usually higher than wholesale
- Volume Moved: variable to small
- Level Of Marketing Management Required: variable, a high level of service for volume sold, "rush orders", premium product usually required
- Associated Costs: washing, cooling packing equipment for high volume, delivery cost
- Farmer Stress: medium to high (see risks)
- Customer Relationships: chef, cook relationship

Evaluate School/Institutions:

- Risks: buyer back-out, inconsistent orders, specific items, demand for local food opposite from normal growing season in the North
- Prices/Profit Potential: low, wholesale
- Volume Moved: variable
- Level Of Marketing Management Required: high level of service for volume sold, "rush orders", must meet packing standards and certifications
- Associated Costs: washing, cooling packing equipment for high volume, delivery cost

- Farmer Stress: medium to high (see risks)
- Customer Relationships: chef, cook relationship, administrator influence

Customer Relationship Management Depends on Markets:

- Are you direct marketing at farmer's markets or CSA's?
- There will be personal data to record and provide opportunity for emails, texts, promotions, coupons.
- Must keep personal data secure and private. You receive their data in good faith that they will receive a benefit, a better experience, a "what's in it for them" opportunity. This means more ways to profit.
- Point of sale is the best time to collect data. A simple clipboard with a line for name and email. Offer an incentive. Would you like to sign up and receive a \$1 dollar off coupon by email?
- Find data system you will use and are comfortable with. Excel, email blasts, texts, snail mail, etc.....
- Small businesses depend on customer loyalty. This comes through positive experiences. How will you manage multiple relationships?
- Pay attention to preferences, listen to them. Acknowledge birthdays with a bonus or incentive.
- Positive communication is key.
- Only contact customers with something meaningful to them such as:
 - Something new arrives or new varieties
 - Special events
 - One time offers
- Information they need to know- i.e., a new drop off point, start dates, etc.
- Are you marketing wholesale to distributors, groceries, or restaurants?
- Learn their order systems: like which day of the week they order, preferred packaging, preferred delivery date, frequency of orders, volume of orders etc.
- Prepare a weekly sheet of what is available and prices
- Communicate about seasonal supplies
- Expect some to negotiate pricing
- If a chef is in charge, ask when is a good time to meet with them. It is an opportunity to bring samples and showcase unusual "heirloom" varieties
- When meeting initially, bring product sheet with prices, terms of payment, contact info, brochures, business card, product samples

Logos, Packaging, and Image for Markets:

- Create a brand logo, reflective of your enterprise. Remember it must communicate your 60 second pitch clearly. Create an emotional connection with your story, if possible.
- If you use terms like "certified all natural, organic, heirloom, heritage, local, grass-fed, or pasture-raised", will your customers automatically know what these terms mean? You must define them for your farm.

- Packaging should meet the customer's need. Are the sizes of bags for greens appropriate or too large or too small for customers weekly need? If they tell you they still have some left from last week, bags may be too large. Decrease the volume slightly, lower the price slightly, and sell them a fresh bag.
- Packing helps to increase perceived value of your product. Keep customer in mind when creating labels, remember to list benefits that sell, not features that tell. Make your product fit the customer if possible.
- Is your website listed on your labels? Your story can expand there.

Farmer's Market Displays:

- Make your main sign attractive and easy to read. Make sure you follow market regulations
- Create signs for each product with name and price clearly printed
- If selling cottage industry products, make sure labels are in compliance
- Create height and depth to give illusion to larger amounts of product
- Alternate colors on stand to be visually stimulating
- Consider shop-ability: some people must touch things, examine them and re-arrange them, (even if it bothers you, it is part of their experience-draw the line at damaging the product, i.e., squeezing)

Customer Service at Farmers Markets:

- Be neat and clean, do not smoke in front of customers
- Have signs clearly identifying you and your product
- 10-4 rule: if customer is ten feet away, make eye contact and smile, if four feet away, greet them. Ask what brings you to the market today? Is this your first time here? (Only ask this if you don't know them)
- Be on your feet, attentive
- Stay off the cell phone. It gives appearance of being inattentive to customers.
- Remember this is your business. Be professional. Even if you wear overalls and a farm cap. (You could get t-shirts printed.)
- Cross-sell: point out other products that go together.
- Include a card or paper with more product or farm information in your bag.

Putting It All Together:

- Depending on the size of your enterprise, it is always a good idea to have more than one market channel.
- Aim for one market you can count on for consistent sales.
- Aim for a secondary market for surplus.
- Aim for an easy outlet like an honor system self-serve farm stand when bumper crops like sweet corn arrive.

- Only you can develop a marketing plan that brings you profit. Which channels can you combine to bring you the most profit, least amount of waste and least amount of stress?
- We combine a CSA, farmer's markets, a restaurant and seasonal farm stand as marketing channels by which we can sell nearly everything we produce.

NEXT SECTION: TOPICAL CHECK LISTS FOR CSA MANAGERS

- Develop Business and Marketing Strategy
- Manage Office Functions
- Governmental Compliance
- Customer Service and Public Relations
- Managing Staff Effectiveness
- Seasonal Crop Production
- Soil Preparation
- Maintain Crop Production
- Managing Harvest and Packing
- Product Delivery Methods
- Respond to Environmental Variables
- Maintaining Equipment and Facilities

Develop Business and Marketing Strategy Checklist:

- A. _____ File Business Identity Forms with State and Federal Agencies
- B. _____ Recommended to Create a Limited Liability Company (to protect personal assets)
- C. _____ Identify Funding for CSA Start-up (loan, memberships, grant, savings)
- D. _____ Create a Budget
- E. _____ Create a Business Plan: Identify goals, clients, markets, , partners, etc.
- F. _____ Create a Marketing Plan: target audiences, how to reach them, methods of communication, more than one outlet
- G. _____ Develop a Brand or Logo: research, get input, does it accurately reflect your product?
- H. _____ Create a Website: create content for pages, take photographs, select shopping cart items for sale.
- I. _____ Develop Promotional Materials: brochures, business cards, signs, magnets, banners- communicate clearly
- J. _____ Create Social Networking Presence: select platforms and maintain- delegate to non-production staff?
- K. _____ Maintain Contact Database: actual customers according to product categories- veggies, meats, fruits, flowers
- L. _____ Maintain Outreach Activities: Farmers Markets? Fairs? Radio? Annual Farm Events?
- M. _____ Participate in Food Safety and GAP Training in Preparation for Marketing

Manage Office Functions Checklist:

- A. _____ Establish Product Cost and Price List
- B. _____ Update Packing and Delivery Orders
- C. _____ Write Newsletter and Distribute: digital, text, weekly, monthly
- D. _____ Develop Office Forms and Registration Brochure Packets
- E. _____ Coordinate Customer Billing
- F. _____ Set-up Bank Accounts: create checking account, order checks
- G. _____ Prepare Bank Deposits, Balance Check Book, Process Payables,
Customer Billing
- H. _____ Complete Computer Updates: software, new clients, etc.
- I. _____ Analyze Surveys
- J. _____ Analyze Market Effectiveness and Sales

Governmental Compliance Checklist:

- A. _____ Obtain Food Safety Training/ GAP Training
- B. _____ Obtain Scale Certification (Often free with county auditor)
- C. _____ Provide Workman's Compensation Coverage
- D. _____ Maintain Auto Insurance Policies
- E. _____ Maintain License Plate Renewal
- F. _____ Maintain Pesticide Applicator License
- G. _____ Maintain Organic Certification
- H. _____ Provide Personal Protection Equipment
- I. _____ Obtain Food Assistance Certification: Women, Infants, Children
(WIC), Farmer's Market Nutrition Program (FMNP), Senior Farmer's
Market Nutrition Programs (SFMNP)
- J. _____ Maintain Any Other Licenses Required by the State

Customer Service and Public Relations Checklist:

- A. _____ Develop a Customer Satisfaction Policy: Replacement or money back?
Customer vacation policy?
- B. _____ Respond to Customer Concerns ASAP: What is this veggie? Can
someone else pickup my basket?
- C. _____ Provide Customer Service Training to Other Staff: Are they service
oriented?
- D. _____ Conduct Site/Farm Tours
- E. _____ Conduct Surveys on Pertinent Matters
- F. _____ Memorize Names of Members
- G. _____ Educate Staff in Production Practices: Train them to answer questions
on the CSA
- H. _____ Maintain Contacts/Members Database: Record personal notes on
clients like birthdays or death of family members
- I. _____ Send Thank You Notes for Supporting Your Farm
- J. _____ Provide Ideas for Using Products

Managing Staff Effectiveness Checklist:

- A. _____ Provide Staff Training: (Even if this means educating yourself first)
- B. _____ Develop Job Descriptions: (This will help analyze what needs done)
- C. _____ Develop Policies/Procedures: Wash buckets, record it, weigh produce
- D. _____ Evaluate Staff Efficiency: Work smarter, not harder?
- E. _____ Conduct Regular Staff Meetings: (Even if it is you and your spouse)
- F. _____ Provide Incentives to Staff
- G. _____ Resolve Staff Issues Quickly
- H. _____ Promote Team Building and Good Interpersonal Skills
- I. _____ Listen to Staff Upgrade Suggestions or Ideas
- J. _____ Promote Problem Solving Skills
- K. _____ Encourage Flexibility, and Adaptability to Plan Changes (Due to weather, etc.)
- L. _____ Insist on Good Customer Care: Staff represents you!

Seasonal Crop Production Checklist:

- A. _____ Review Past Records If Available
- B. _____ Consult Production Team to create Crop Plan: Select crops, how often, perennial/seasonal crops available, volume, etc.
- C. _____ Establish Crop Planting Schedule: Dates, evaluate maturity times of varieties, seasonal heat and sun
- D. _____ Design Field Layout and Crop Rotation, Succession Planting
- E. _____ Determine Crop Requirements When Planting: Seeds, or transplants, irrigation
- F. _____ Select Varieties for Your Region: Growing days, season of planting, soil structure, etc.
- G. _____ Order Varieties Selected: Order early to get your desired variety (Late December, early January)
- H. _____ Review Weed and Pest Control Options: execute plan
- I. _____ Order Field Supplies (Twine and stakes for tying tomatoes, etc.)
- J. _____ Hire and Train Seasonal Labor
- K. _____ Record Actual Crop Maturity and Yield Data

Soil Preparation Checklist:

- A. _____ Prepare Samples for Soil Testing: field #, locations, how often?
- B. _____ Develop Fertility Program: Compost, cover crops, organic fertilizer
- C. _____ Acquire Fertility Amendments
- D. _____ Manage Fertility Program: Spread compost, plant cover crops
- E. _____ Till Soil or Prepare Soil Beds as Planned: (include high tunnel beds)
- F. _____ Develop Plan for Seeding Transplants: Which crops, seeding dates, number of cells per flat
- G. _____ Acquire Potting Soil for Seeding Transplants
- H. _____ Acquire Heating Mats and Pots, Flats, Containers
- I. _____ Set Up Potting Location for Seeding Transplants

Maintain Crop Production Checklist:

- A. _____ Plant Seeds in Containers at Specific Dates According to Plan
- B. _____ Plant Seeds in Fields at Specific Dates According to Plan
- C. _____ Plants Bulbs and Tubers: Potatoes, sweet potato slips, onion sets
- D. _____ Monitor Seedling Germination Development: Weed pressure, good germination, damping off
- E. _____ Maintain Seedling Health: temperature (transplant flats), moisture
- F. _____ Purchase Transplants Not Seeded on Farm
- G. _____ Set Up Irrigation
- H. _____ Determine Irrigation Needs: (Essential for High Tunnels)
- I. _____ Maintain Water Quality
- J. _____ Replant Failed Plants Due to: Poor germination, flooding, heat
- K. _____ Weed Crops in Fields as Needed

Managing Harvest and Packing Checklist:

- A. _____ Determine Crop Maturity
- B. _____ Determine Volume of Crop Required
- C. _____ Provide Restroom and Hand Washing Facility for Staff
- D. _____ Provide Harvest Aids: (Knives, pruners, scissors, buckets)
- E. _____ Determine Harvesting Order: Greens first early to keep cool
- F. _____ Hand Harvest Crops
- G. _____ Provide Sun Protection for Harvested Crops
- H. _____ Field Pack Crops: Crates, buckets, baskets
- I. _____ Rinse Harvested Crops: Remove sand and soil, insects
- J. _____ Grade or Trim Harvested Crops
- K. _____ Bunch Harvested Crops: Beets, turnips, carrots, radishes, kale, etc.
- L. _____ Pre-cool Harvested Crops Until Packing (walk-in cooler, or in cold water)
- M. _____ Determine Packing Order in Bag or Basket: Heavy on bottom, etc.

Product Delivery Method Checklist:

- A. _____ Develop Delivery or Pickup Times and Locations
- B. _____ Develop Delivery Checklist: Customer names, restaurant billing, payments due, etc.
- C. _____ Plan Delivery Route: Farmers Markets, Direct Customers, Parking Lots, Restaurants, etc.
- D. _____ Determine Delivery Vehicle and Driver, Times
- E. _____ Determine Product to be Delivered (in Writing)
- F. _____ Load Products in Order of Delivery Route
- G. _____ Verify Delivery Completion, Record, Signature?
- H. _____ Return Empty Delivery Containers to Proper Location, Sterilize
- I. _____ Service Delivery Vehicle When Needed
- J. _____ File Delivery Records
- K. _____ Verify Driver is Licensed and Capable

Respond to Environmental and Climate Variables Checklist:

- A. _____ Monitor Growing Environments: Especially high tunnels
- B. _____ Check Weather Forecast: Long term, short term, heat, rain, frost
- C. _____ Scout for Pests: Evaluate damage
- D. _____ Determine Protective Measures Required for Crops: Row covers, traps, lures, scare aways, fences
- E. _____ Apply Protective Measures: Row covers, rodent traps, fences, etc.
- F. _____ Apply Fungicides or Insecticides If Necessary: (For mildew, etc.)
- G. _____ Release Beneficial Insects
- H. _____ Provide Additional Irrigation When Required
- I. _____ Replant When Necessary
- J. _____ Harvest Crops Early and Refrigerate in Case of Forecasted Frost or Excess Rain?
- K. _____ What is the Appropriate Response to Environmental Variables that Protects Your Product and Keeps Your CSA Profitable?

Maintaining Equipment and Facilities Checklist:

- A. _____ Inspect Production Equipment and Facilities with Staff: Make notes on clipboard of things to address (light bulbs, organize, broken items)
- B. _____ Repair/Maintain Production Facility: assign repair/maintenance and deadline, follow up
- C. _____ Repair/Maintain Production Equipment: assign repair/maintenance and deadline, follow up
- D. _____ Upgrade Inefficient Equipment: (replace non-functioning, cracked or broken items)
- E. _____ Perform Weekly Maintenance on Equipment (sharpen hoes, oil pruners, etc.)
- F. _____ Install High and Low tunnels: Maintain integrity of plastic
- G. _____ Clean Harvest Equipment: (Sterilize harvest buckets, tubs, knives, record)
- H. _____ Calibrate Product Weigh Scales: (County Auditor may do it at no cost)
- I. _____ Service Lawn Tractors, Mowers, Rototillers: pre-season, mid-season