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New Models for Changing Markets



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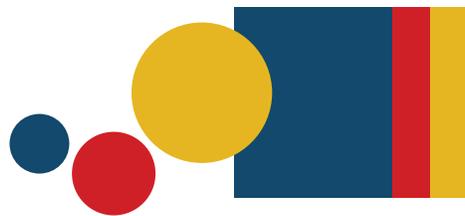
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Community Supported Agriculture

New Models for Changing Markets

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A steady growth in CSAs and related marketing structures has been observed concurrent with the growth in direct marketing and consumer interest in local foods. The CSA model has evolved from its original emphasis on organic and sustainable agriculture along with various measures of shareholder risk-sharing with producers (Ernst and Woods, 2009). Current business models for CSAs are diverse and innovative. Producers have adapted the CSA model to fit a variety of emerging direct marketing opportunities, including:

- Institutional health and wellness programs;
- Multi-farm systems to increase scale and scope;
- Season extension technologies; and
- Incorporating value-added products, offering flexible shares, and flexible electronic purchasing and other e-commerce marketing tools.

A 2009 regional survey by Woods et al., revealed that CSA producers tend to have a diversity of market outlets and have used the CSA model to both scale up and to build a farm brand in community markets. Most CSAs, continuing with the current survey, are small (with some notable exceptions) but growing, maintaining fewer than 80 shareholders. Most businesses have been started within the past 5 years. Producers have been able to diversify marketing channels readily from a CSA base to include direct to restaurants and small grocers and even work with wholesale distributors to reach a wider market area. However, the role and dynamics the CSA plays in helping producers to supply food competitively in the local food system is not very well understood as it is a relatively new business structure with a rapidly evolving model of operation.

This study proposed to identify the trends in CSA business model adaptation including changes in product innovation and profitability drivers as the CSA marketing model evolves to address emerging consumer preferences and direct marketing opportunities. By conducting a national survey of CSAs, researchers hoped to:

1. Describe the current use of the CSA business model, including scale and regional differences;
2. Identify the role and strategic dynamics of the CSA model in a local foods business start-up;
3. Identify the emerging and adapted uses of the CSA model to pursue scale individually and through cooperation and pursue alternative local foods markets; and
4. Examine perspectives of CSA operators on expected future business and market innovations.

These objectives will yield important new knowledge regarding the trends and trajectory of CSAs, providing perspectives on changes in the CSA business model for consideration by current and prospective managers, and identifying future research and education program needs for CSAs for supporting agencies such as Extension, USDA, and local food Nongovernmental Organizations.

Many of the themes and issues featured in the national survey were informed by a series of focus group interviews conducted with CSA operators in six geographically diverse parts of the country. The results of these focus group interviews appear in summary format in the latter part of this report.



What is the issue?

This project provides an analysis of the emerging marketing and business strategy trends of CSAs¹ in the United States. Regional studies (Strochlic and Shelly, 2004; Oberholtzer, 2004; Woods et al, 2009; Galt et al, 2012) have shed some light on trends with this business model, but have tended toward a narrower geographic analysis, have emphasized sociological elements, or had not explored CSAs as part of a comprehensive marketing strategy. These are important dimensions to CSAs given their historical roots, but their role as part of a producer's local foods/direct marketing strategy is changing and not well understood. Regional and scale differences are evident. National studies, such as the Census of Agriculture, indicate 12,617 farms marketed through a CSA in the 2012 Census, up slightly from the 12,549 identified in 2007. Getting an accurate count on CSA businesses is more difficult than it may seem, given the expansion of multi-farm, food-hub, and non-farm-based CSA delivery models. The divergence in CSA counts across various public and private agencies has been addressed by Ryan Galt (Galt, 2011) and the measurement problem continues. The Biodynamics Association, one of a number of local food system advocacy groups, in an effort to provide a history of CSA, cites McFadden's 2012 estimate of between 6,000 and 6,500 CSAs, but also references LocalHarvest estimates at that time of 4,571 active CSAs² (Biodynamic Farming and Gardening, 2012). The CSA definition and counting has only become more difficult. The variations of the CSA value proposition and marketing strategy for producers are also not well understood. Some producers have used the traditional CSA model as a market entry point for local foods distribution and then graduated to other business models as scale allowed. Others have adapted the traditional CSA model to CSA-like models that better accommodate single or multi-farm scale economies.

This study utilizes a national survey of CSA managers conducted in 2014 to document changes in the CSA model with particular attention paid to regional differences, urban/rural location of the farm, and the age of the CSA. Given the rapid growth and increased diversity of business

practices being observed, USDA/AMS, in partnership with the University of Kentucky, conducted the national survey of CSA managers. The survey's aims were to document the emerging marketing and business strategies of producers using the CSA model and to understand the variations in performance and sustainability of the business model. Part of the analysis provides a current description of the CSAs across the country, but a further objective is to understand the dynamics of this model in the context of entry into the local foods market, including understanding the CSA manager perceptions of competing local foods delivery models in various market contexts. The study documents manager interest in multi-farm collaborations to pursue various innovations and adaptations of the traditional CSA model. The results should be instructive to CSA operators, policy makers, and support agencies working alongside various local foods efforts.

The CSA business model has evolved significantly as entrepreneurs and market forces have opened opportunities for the implementation of the model in ways quite unlike the early CSA operations. New products, season extensions, multi-farm collaborations, new shareholder groups, marketing collaborations with different organizations, innovative aggregation and delivery strategies, new urban production connections, and health and wellness alliances are among the current trends reshaping the CSA business. Neil Stauffer, General Manager for Penn's Corner Farm Alliance in Pittsburgh, PA, noted that CSAs have changed from an emphasis on the farmer to the consumer. "When CSAs were first around, it seems like it was more like customers saying, 'We really believe in you, the farmer, and how can we make this work for you?'" he observed. "Now, it seems like it has shifted and the farmers are saying, 'How can we make the CSA work better for you, the customer?'"

A series of six case studies were completed based on interviews with farmers, managers, and customers who represented various models of CSA business organization, market focus, production and marketing innovation across the country. While the authors recognize that there are numerous cases of innovation across CSAs nationally – and

1 Community Supported Agriculture (CSA), as used in this report, is defined as a producer-consumer local production and marketing partnership that involves a subscription-based contract for the delivery of seasonal products from the farm. The traditional CSA placed substantial emphasis on sustainable agriculture, shared production risk, consumer involvement with production activities, and authenticity of local sourcing (Bougherara, Grolleau, & Mzoughi, 2009; Henderson & Van En, 1999). A "shareholder" is defined here as a CSA subscriber, typically a consuming household and a "share" is the season subscription.

2 Localharvest is a web directory for local sourced foods through a variety of market channels. Their national active CSA count for April 2015 was 5,638 according to www.localharvest.org

these aren't exhaustive—they believe that these stories add texture and nuance to the changing character of CSAs in the United States, and help reveal how they are adapting to new opportunities, but also to new competition. Cases were selected for geographic diversity as well as types of innovation, including CSAs from Kentucky, Wisconsin, Pennsylvania, Missouri, Massachusetts, and Colorado.

A geographically diverse case-based approach can be particularly useful for gaining producer and agency perspectives on innovations in the CSA marketing model. To that end, a set of CSAs were selected nationally that represented traditional single farm models; co-operatives/multi-farm CSAs; low-income consumer-targeted CSAs; multi-farm innovations targeting particular consumer segments with a unique health and wellness marketing partner; CSAs associated with urban market innovations; and a for-profit food hub concept that utilized a CSA aggregation and distribution model. Interviews with key informants affiliated with each CSA or CSA community were coordinated through a variety of agency contacts.

What did the study find?

The study documents important trends associated with the CSA business model nationally. The CSA model has been in place for many farms for some time now. The earliest CSAs established in the United States date back to the mid-1980s, and more than 25 percent of the managers who responded to the survey indicated their CSA had been in operation for over 10 years. CSAs have grown in number as documented in the Census of Agriculture, but the national CSA manager survey indicates they have also grown in shareholder size over the past 3 years (note table 4).

The CSA business model has definitely evolved. Only about 27 percent of the CSAs surveyed are certified organic, a departure from the focus of the earlier CSA movement (46 percent were certified organic and 92 percent were at least using organic or biodynamic practices in the 2001 survey by Lass et al). Many of the surveyed CSAs have taken advantage of new direct marketing tools, including web-based sales, season extension technologies, and offering a greater diversity of products – including processed items. Most of them have a diversified marketing mix, utilizing a variety of other market channels. The majority of CSA managers who responded to our survey also sell through farmers markets and area restaurants, but often include other market channels, as well.

Surveyed CSA managers generally view their markets positively for growth potential and see the CSA distribution model as an important contributor to farm sales (58 percent indicate that the CSA accounts for at least half of all their farm sales) and profitability. About 55 percent indicated that the profitability of their CSAs had at least increased to some degree since they had started their CSA – with 10 percent indicating that their profitability had “increased a lot.” Furthermore, more than half of surveyed managers expected their CSA sales to increase over the next 2 years.

There is some evidence of variability in perceived market demand and the profitability/performance outlook for CSAs depending on region, proximity to urban centers, and the CSA's age, which are documented and discussed throughout the study. The CSA distribution model is being adapted to numerous products, markets, and groups of producers. This study found roughly similar utilization of various and alternative market channels for CSAs regardless of their proximity to urban locations. The differences were more evident in the production techniques, product markets, and business strategies implemented, highlighting the diversity of approaches CSA operators adopted depending on their specific market context.



CSAs use websites to sell product and give information on locations of farm stands, restaurants and wholesale markets where their product is sold.

The study documents differences in manager perceptions of competition for local food to local markets coming from new CSAs, expansion from existing CSAs, farm markets, and other retail channels that have also expanded local foods marketing. The determination of who is the competition seems to be largely influenced by proximity to urban markets and the age of the CSA, and to some degree, on the CSA's location.

Surveyed CSA managers also seemed generally interested in exploring multi-farm business innovations and collaborations that enable them to pursue new markets, engage in more aggressive promotion, offer vouchers to select consumer targets, share logistics, and share production. However, the degree to which these innovations had been successfully adopted by CSA managers varied considerably. For example, the interest in voucher programs targeting low-income consumers and clients of health and wellness programs seemed to greatly outweigh current practice, suggesting that there seems to be room to help facilitate selected aspects of multi-farm CSA cooperation before it reaches its full market potential.

The case studies provided numerous illustrations of business model innovation, underscoring the fact that the CSA marketing model continues to be adapted to fit many market circumstances. Based on manager perceptions

of business growth, competitiveness, and profitability, there appears to be growth potential for a diversity of successful strategies within the CSA framework – including single farm, multi-farm, co-operatively owned, and even non-farm owned. The study also identified a diversity of market targets as yet untapped, including the traditional shareholder who prefers organic produce. However, it is clear from both our case studies and our survey that CSA managers are increasingly focused on using their CSA as a way to facilitate consumer access to local foods in general, rather than specifically targeting consumers of organic fruit and vegetables. Farms and farm networks are continually finding new ways to reach non-traditional market segments with CSA shares. This includes incorporating e-commerce, adding products through season extension and multiple season offerings, adding shares for alternative product lines beyond traditional produce, and working with urban, health/wellness, and community development partners to access a broader base of customers, including lower income shareholders. The Madison, WI, FairShare CSA Coalition has utilized wellness plan vouchers to substantially expand demand for share participation with local farmers. Coalition members, as still independent farm-CSAs, have organized to both collectively promote the voucher program and to provide quality standards critical to maintaining the program. Denver area CSAs have provided many of their own innovations including collaborations with city planning, urban markets, and peer-learning among CSA farmers. Non-farm aggregation models to deliver CSAs have been emerging as well, including the Fair Share CCSA in St. Louis where a small food retailer built a CSA business around a shared vision for local foods with area farmers.

How was the study conducted?

This study is a follow-on study that explored six cases in CSA innovation. The earlier study included both individual farm and multi-farm initiatives and explored a variety of non-traditional approaches to CSA products and target markets. The study utilized a web-based survey to explore national business development trends for CSAs based on observations in the initial case studies. We designed the survey instrument to examine current business characteristics, sales in related market channels, changes in production and marketing strategies, competition and local food demand, prospects for business cooperation, and shareholder recruitment. The target population was CSAs that had been in operation for at least 2 years, given the emphasis on changes in business activities.



CSAs innovate to reach urban and non-traditional markets in East Boston.

There was no current national CSA database of addresses available from which to develop a distribution list. Therefore, a master list had to be compiled drawing from communications from State departments of agriculture, local foods registers, and food marketing databases. Many of these were out of date and required updating for current contacts. A database was assembled through a variety of earlier business lists assembled by the Robyn Van En Center,³ but expanded through updates provided by various State departments of agriculture, grower associations, and LocalHarvest.com listings. We assembled a database and sampling process that would provide equal representation in the final sample and allow comparison of regional differences. A balanced sample of 525 was therefore selected from each of the four regions of the country, using USDA designations for Southeast, Northeast, North Central, and West.

We sent a preliminary invitation to the CSA manager or lead operator requesting participation and explaining the goals of the survey. Any CSA could opt out. We followed up 3 weeks later with a second invitation. Surveys were distributed to 2,100 addresses that did not opt out of the study, 525 to each region. A total of 495 CSAs returned usable surveys during the period of February to July 2014, yielding an approximate 24 percent effective return rate. Usable responses regionally were collected from the Northeast (100), North Central (119), Southeast (87), and West (189), providing some differences in response rates by region.

We used a case-based approach to gaining producer and agency perspectives on innovations in the CSA marketing model ahead of the national CSA manager survey. A set of CSAs were selected nationally that represented:

- Traditional single farm models,
- Cooperatives/multi-farm CSAs,
- Low-income consumer-targeted CSAs,
- Multi-farm innovations targeting unique consumer segments with a health and wellness marketing partner,
- CSAs associated with urban market innovations, and
- A for-profit food hub concept that utilized a CSA aggregation and distribution model.

These cases were selected to provide a diversity of market and geographic perspectives. We coordinated interviews with key informants affiliated with each CSA or CSA community through a variety of agency contacts, including local Extension offices, producer associations, local food non-profits, and local government agencies.



Changes in the CSA Model Over Time

Farmers who have adapted and innovated to reach growing local market demand have found numerous ways to adapt the CSA subscription model in a way that fits their goals and unique market conditions. The model is highly flexible to accommodate a variety of products – produce, meat, dairy, eggs, as well as value-added and processed products coming from the farm.

The definition of CSA has evolved as well. Farmers and shareholders both have adapted the concept to encompass and represent a variety of local food systems relationships. The more successful models, those CSAs characterized as sustainable business ventures while meeting the mutual mission goals of the farm and shareholders, have maintained a close farmer-consumer connection. The inclusion of urban community development and health care workers has actually added an interesting new dimension to the CSA community, as well as peer-to-peer learning. Many consumers view the CSA as an extension of the community farm market experience and seem happy to include other community partners.

The term “CSA” is becoming increasingly confusing to many. Most farmers and consumers recognize and understand the subscription model, but need additional reflection around the meaning of community as it relates to sustainability. As other business models emerge that are seeking to take advantage of the growing demand for local food, farmers will need to pay particularly close attention to the meaning of community as a means of differentiating themselves to their core consumers.

Most of the farmers we interviewed selling through CSA also had significant marketing activity in community farm markets, on-farm retail, direct to restaurants and grocers, and other market channels. Farmers were selling increasingly more through the CSA as the model was able to be adapted to their customer needs. Few farmers recommended the CSA as a starting point for new producers. The production management, distribution, and marketing require considerable expertise and benefits substantially from experience.



CSA Growth Opportunities

Growth opportunities fall in a number of categories – new products, season extension or year-round sales, scaling up through multi-farm partnerships, utilizing e-commerce, and connecting to new consumer segments. This can include low-income consumers or health and wellness programs.

New product opportunities have emerged for CSA distribution of all different kinds of products – cheese, fish, flowers, wine, sauces, and other custom-processed or co-packed products have added to consumer interest and seem to relate to shareholder retention. Shareholders are drawn to greater variety, but farms must be cautious not to press for too great a variety. There are diminishing returns associated with greater inventory management.

Season extension is a great opportunity, allowing farms to significantly expand the scope, timing, and quality of products coming from protected agriculture environments. This makes part-season shares and specialty shares more feasible as well.

The role and effectiveness of multi-farm CSAs was mixed. There is a sacrifice in control and challenges with managing quality and consistency. There is a risk of loss in perceived value to the shareholder moving from a farm estate product to an aggregated “local” product that may not be identified with a specific farm. Still, many producer associations that are aggregating product through warehouses (e.g., Penn’s Corner) have found equitable ways to utilize their collective scale to put in place resources like managers and/or collectively promote their products to the local foods community. Others, somewhat aligned with the food hub model, have found volume and product variety advantages to aggregation, creating market opportunities for participating farmers who probably wouldn’t be there otherwise (e.g. Fair Shares in St. Louis).

E-commerce will likely play an increasingly important role in both logistics and marketing for CSAs. New firms like Farmigo and Small Farm Central are among a number of new private support ventures that help CSAs expand this means of shareholder and producer communication and trade. Social media connects closely with the community dimension of CSA and can also play a part in enhancing producer-shareholder linkages.



CSA Business Models and Risk Management

Many advantages to the CSA model were noted throughout the various interviews. Farmers in the more traditional single model continue to identify cash flow, relative profitability to other marketing channels, production planning, and product flexibility as main attractions. Farmers noted that, much like farmers markets, the CSAs can be a good platform to introduce new products on an experimental basis or to expand variations on share types (adding meat or egg shares, or offering half-shares), taking advantage of a highly interactive direct-to-consumer framework that can provide good feedback on demand.

However, multi-farm models can be beneficial as well. Multi-farm CSAs have the potential to help farmers manage specialty crop risk by contributing to a more diverse portfolio of products that can collectively be more attractive to local food buyers. They can open new markets through expanded scale or scope. Developing this advantage requires having the right partners and not every CSA is willing to engage other producers where supply and quality may not be consistent.

CSAs have also successfully worked through community partnerships with urban, land, or economic development agencies that help farmers access non-traditional markets. These partnerships make the CSA model attractive largely because products and services can be readily adapted to customer needs in markets not traditionally served by these farms. The CSA business model, whether single or multi-farm, has been adapted to allow farmers to make a stronger connection to their most loyal customers using more flexible products and services and cost-effective distribution models.

Farmers do many things to collaborate to make their CSA successful including coming together to market, sharing personnel resources, diversifying products, adding new product lines, developing shared e-commerce platforms, and providing greater supply assurance to shareholders and/or wholesale customers. Farmers also develop peer education and shareholder education on health and nutrition through collaborations with other community-based partners.



CSAs diversify their products through meat and egg shares.

Future of Community Supported Agriculture



Most farmers in these cases remained very optimistic about the opportunities for growth and continued innovation. The CSA seems to be both flexible and effective as a means for connecting with consumers who value local products and closer relationships with farms. The future of CSAs will have to balance the economic benefits of various multi-farm and third-party aggregation strategies that necessarily place increased distance between the farm and the consumer and the challenges and growth limits of remaining very focused on a local community.

There is increasing competition for the local food dollar as consumer demand for local food expands. Other retailers see a range of preferences for local products – from a core group with very strong preferences and conceptions for local to those who might have some interest in local but may be more price-sensitive. Grocers, specialty wholesalers, and other dedicated distribution firms have tried to make inroads into these markets and provide some degree of new competition with CSAs.

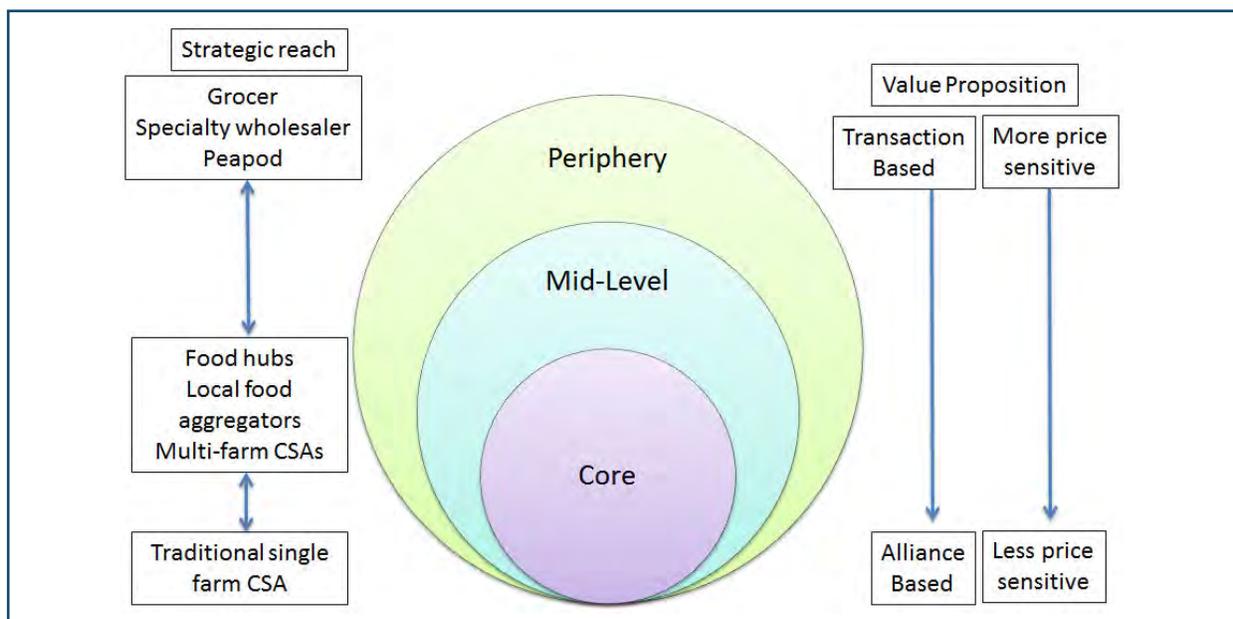
Farms that are able to clearly differentiate their offerings through close or direct relationships with customers are in a good position to maintain their advantage, particularly with the core consumer. There are strategic questions farmers must address as they consider multi-farm models and the future of CSA, particularly as individual farm

identity is lost. These types of aggregation models place them closer in concept to the retailers that are pursuing the loyal local foods customer.

The inclusion of new community partners that may not have been previously associated with CSA offers substantial promise for CSA farms to build on their value proposition. This includes collaborations with health and community agencies, economic development partners, low-income support agencies, urban development projects, community property development projects, and other local food marketing partners, all of which can contribute to new opportunities for CSA farms.

The balance between building toward a critical mass of local food awareness distributed through a variety of local channels and actual market competition will be a factor CSAs will have to watch closely. They will need to pay attention to their unique value proposition and how the CSA can uniquely deliver that – particularly to the core local foods consumer who places very high value on a close relationship with the farmer. The strategic reach of retailers and other aggregators is generally more mediated as they try to reach local consumers, but they are getting better at it. Figure 1 suggests a conceptual framework for considering the spectrum to local food marketers and their strategic reach against the local food consumer value proposition.

Figure 1. Local Food Strategic Reach and Value Proposition to CSA Shareholders



CSA Manager Survey Design and Data

We utilized a web-based survey to explore national business development trends for CSAs. The survey instrument was designed to examine current business characteristics, sales in related market channels, changes in production and marketing strategies, competition and local food demand, prospects for business cooperation, and shareholder recruitment. CSAs that had been in operation for at least 2 years were the target population, given the emphasis on changes in business activities.

There was no current national CSA database of addresses, so we compiled a master list drawing from communications from State departments of agriculture, local foods registers, and food marketing databases. Many of these were out of date and required updating. We selected a sample of 525 from each of the four regions of the country, using USDA designations for southeast, northeast, north central, and west.

We sent a preliminary invitation to the CSA manager or lead operator requesting participation and explaining the goals of the study. Any CSA could opt out. Three weeks later, we followed up with a second invitation. Surveys were distributed to 2,100 addresses that did not opt out of the study, 525 to each region. CSAs returned a total of 495 usable surveys, yielding an approximate 24 percent effective return rate. We collected usable responses regionally from the northeast (100), north central (119), southeast (87), and west (189), providing some differences in response rates by region.

Demographic characteristics of the CSA managers responding to the survey suggested a relatively large share of female managers, younger, and generally well-educated. These are summarized in table 1.

Table 1. CSA Manager Characteristics

Gender	
Female	259
Male	171
Age	
18-24	7
25-34	102
35-44	116
45-54	92
55-64	87
65+	26
Education	
Less than high school	0
High school graduate or equivalent	16
Some college/associate's degree	94
Bachelor's degree	187
Graduate or professional degree	131

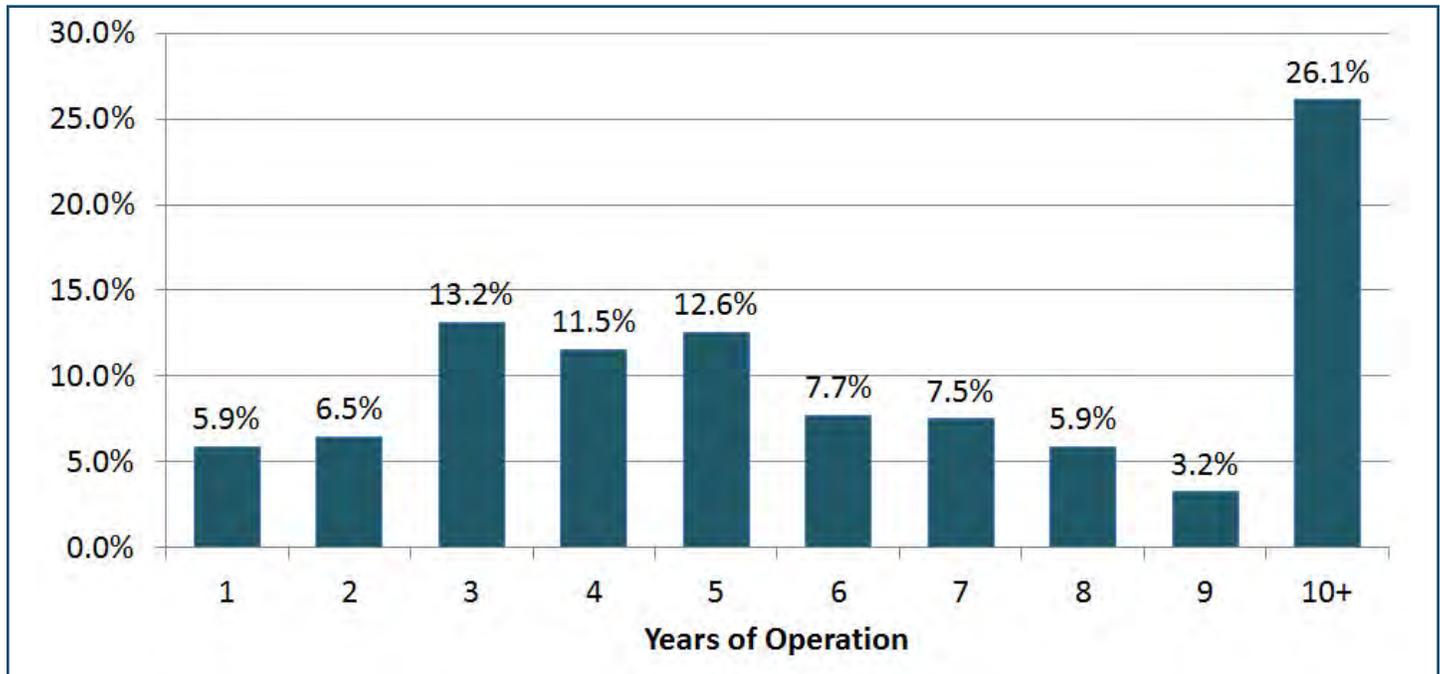
CSA Business Characteristics

Seasons in Operation

Many CSAs have been around for a while, over 26 percent having been in business for over 10 years. The survey targeted CSAs that were more established with a view to looking at business trends over recent years. This population was screened to only include those that

had been in existence for at least 2 years – a handful of respondents indicated only one season of actual production. There is evidence of a cluster of CSAs that have been around for 3-5 years and another for 10+ years. The CSA typically involves a few years to establish to plan for production and to recruit shareholders. Figure 2 provides a summary of the distribution of CSA seasons of operation.

Figure 2. How many seasons has your CSA been in operation?



Characterization of Production Methods

Organic production may have been the focus of CSAs early in the CSA movement, but there has been a clear shift to non-certification; only 27.2 percent indicated organic certification of production. Most managers indicate they are implementing production systems at least according to organic standards or certified (86.2 percent). Table 2 summarizes production methods.

Table 2. How would you characterize your production methods?

Production	N*	Percent
Certified organic	134	27.2%
According to organic standards, but not certified	291	59.0%
Incorporate some organic along with conventional methods	61	12.4%
Primarily conventional growing techniques	7	1.4%
Total	493	

Farm Sales Share from CSA

The average share of sales to the farm operation coming from the CSA was reported to be 53.2 percent. The CSA was the major market channel for 58.1 percent of those reporting. The role and changes with other market channels is taken up in more detail later. Table 3 summarizes the share of farm sales from CSA.

Table 3. Percent of total farm sales comes from CSA

% Farm Sales from CSA	N*	Share of Responses
less than 25	120	25.5%
25-49	77	16.4%
50-74	117	24.9%
75-100	156	33.2%
Total Responses	470	100.0%
Average % of Farm Sales From CSA	53.2	

Shareholders Enrolled

CSA managers were asked to provide observations in the number of shareholders during the last 2 years and an estimate for 2014. Average growth in participation was +6 percent in 2013 and another +11 percent in 2014 (table

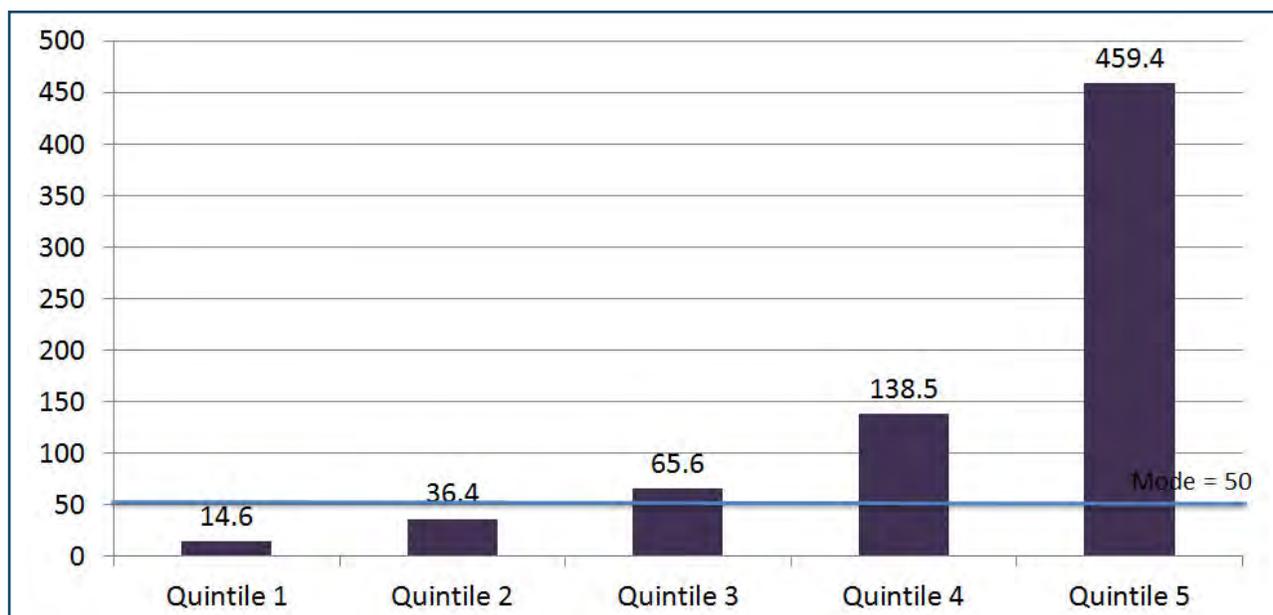
4). It is especially interesting to look at where they have grown faster by proximity to urban areas. CSAs with more of an e-commerce orientation in another recent survey were observed to be larger and growing at an even faster rate. Huntley observed in CSAs participating with Small Farm Central, 248 CSA farms that were also part of the memberassembler.com E-commerce support network reported larger share sizes among this group – averaging 213 shareholders with an average CSA income of \$30,342 and an average 79 percent sales growth over 2013 sales (Huntley, 2014).

Table 4. How many CSA patrons did you have enrolled in...

	2012	2013	2014
	— Shareholders —		
Average All CSAs	120.4	127.4	140.9

Although average shareholder size has been growing, there are a large number of relatively small CSAs. The average shareholders reported for 2014 was 140.9, but the median response was 60 shareholders. Shareholders numbers reported at each quintile suggest a wide range between the smaller and larger CSAs – a long left tail in the distribution from the mean, as noted in figure 3. In 2014 61 percent of the CSAs reported under 100 shareholders (down from 65 percent in 2012).

Figure 3. Distribution of Shareholders Across Sample



CSA Proximity to Urban Communities

Farms utilizing the CSA distribution model locate in a variety of settings. We explored the proximity of the CSA to urban areas through the survey instrument. Responses indicated a fairly even distribution between urban and rural locations. Location will likely have implications for distribution and collaboration tendencies, as well as general shareholder growth, sales volume, and opportunities to develop various markets. Table 5 summarizes CSA farm location information.

Table 5. Which of the following best describes where your CSA is located?

Location	N*	Percent
Near (within 50 miles) a large city (over 1 million)	104	24.2%
Near (within 50 miles) a small city (250,000-1,000,000)	143	33.3%
Small town	114	26.5%
Countryside	69	16.0%

*N= 430

Regional analysis of the data suggests considerable geographic differences, summarized in table 6. CSA shareholder size was larger in the Northeast and smaller in the Southeast. Probably related, the average age of the CSA was older in the Northeast and smaller in the Southeast compared to the national average. Western-based CSAs were slightly more likely to be certified organic, and less so in the Southeast. CSAs in the Southeast were more likely to be located within 50 miles of an urban center, while rural settings for production were more likely in the other regions.⁴

Differences in the expected profitability of the CSA looking ahead to the next 2 years were most striking between those on the lower end of the range in the Northeast (39 percent) to the high end of the range in the North Central region where 59.7 percent of respondents expected increased sales. Sales growth expectation is an important variable and reflects the manager's perception of competition, local demand, and opportunities to innovate.

Table 6. CSA Business Characteristics by Region

	Region*				
	Northeast	North Central	Southeast	West	Overall
Average CSA Size (shareholders estimated for 2014)	203.8	154.5	105.9	125.7	144.8
Age of CSA** (years)	7.8	6.5	6.0	6.8	6.8
Certified Organic (%)	28.0%	22.7%	19.5%	32.8%	27.2%
Share in Urban Location***	54.7%	54.7%	67.1%	56.5%	57.4%
Expect Increasing CSA Sales Next 2 Years	39.0%	59.7%	52.9%	51.3%	51.1%
N	100	119	87	189	495

*Regional designations of various states in this study follow those made by USDA – Northeast, North Central, Southeast, and West.

**The average age of CSAs by region used an imputed value of 13 years for the categorical variable “10+ years” for the purposes of estimating an average over each group.

***A significant number of respondents reported their CSA location close to urban population centers. Urban here means located near (within 50 miles) of a large city – over 1 million or small city – 250,000 to 1,000,000. Specific responses related to location by region are reported as follows:

	Northeast	North Central	Southeast	West	All
Urban	47	58	47	95	247
Total	86	106	70	168	430

4 A previous national survey of CSAs by Lass, Stevenson, Hendrickson, and Ruhf in 1999 noted 41% of the CSAs as certified organic – although this was prior to the USDA certification. The median respondents sold 29 full shares and 23 half shares, and 70% reported operating on 49 acres or less – at a median of 18 acres.

Other Market Channels for CSAs

The CSA marketing channel was clearly a substantial focus and priority among those managers responding to the survey. Many CSAs utilize additional market channels to diversify and to complement their CSA market. Low and Vogel (2011) discuss many of the issues relating to direct and intermediated markets. This survey did not explore the specific use of and relationship to intermediary market partners, although specialty wholesalers and food hubs have certainly ventured into the CSA subscription-type delivery model, sourcing from local producers and aggregating products for delivery. Wholesalers have increasingly partnered with growers to better serve area grocers and restaurants with local products. It is evident, however, that other direct marketing channels (community farmers markets and on-farm retail) are more common marketing venues for CSAs.

Table 7 summarizes the level of activity that survey respondents reported in various marketing channels. One of the more striking results was the extent to which CSAs sell to restaurants – over half of them. The specific use of direct-store deliveries versus using intermediaries in delivery was not explicitly addressed, although it is not surprising to see restaurants and farmers markets dominate the list of alternative market outlets for CSAs given the complementary distribution strategies typical of CSAs.

We conducted an analysis of the data to explore possible differences in market channel strategy by urban versus rural location of the CSA. This value does not necessarily correspond to actual sales by channel, which may still be different by business location. But, as noted in the summary on table 8, the marketing channel mix broken out by proximity to population centers seems to be approximately the same with only slight variations.

Table 7. Indicate which markets you used to sell farm products

Market	N*	Percent
CSA	469	100.0
Farmers market	304	64.8
Restaurants	258	55.0
On-farm retail	194	41.4
Grocery	180	38.4
School/institutions	92	19.6
Contract to processors	17	3.6
Auction sales	12	2.6
Other (please specify)	76	16.2

Table 8. Market Channel Participation by CSA Location

Location	Near large city	Near small city	Small town	Countryside
CSA	100%	100%	100%	100%
Community farmers market	60%	69%	69%	68%
On-farm retail market	47%	37%	35%	56%
Grocery	32%	38%	44%	43%
Restaurants	58%	61%	54%	47%
Schools/Institutions	19%	17%	26%	19%
Auction sales	4%	2%	2%	0%
Contract to processors	3%	5%	4%	3%

Managers were asked to provide an outlook for the various market channels, looking ahead to sales changes in the various markets over the next 2 years. Managers were provided a “does not apply” option for each market where they either may not be selling or don’t have a good feel for the channel. The majority of responses expected increases in each of the market channels with the exception of auction markets.

Sales to schools/institutions were noted most frequently as being expected to increase, followed by on-farm retail, restaurants, grocery, CSAs, contracts to processors, and farmers markets. Only about 10 percent or fewer expected to see decreasing sales in any of these markets. Table 9 summarizes these observations.

Table 9. How do you expect sales to change in these markets over the next 2 years?

Sales Change	CSA Channel	Community Farm Market	On-farm Retail Market	Wholesale to Grocery	Wholesale to Restaurant	Wholesale to Schools & Institutions	Auction	Contract to processors
Decreasing	51	33	8	24	31	6	5	4
About the same	163	123	78	72	92	33	8	16
Increasing	253	175	158	132	182	98	5	23
N	467	331	244	228	305	137	18	43
By Percent								
Decreasing	10.9%	10.0%	3.3%	10.5%	10.2%	4.4%	27.8%	9.3%
Same	34.9%	37.2%	32.0%	31.6%	30.2%	24.1%	44.4%	37.2%
Increasing	54.2%	52.9%	64.8%	57.9%	59.7%	71.5%	27.8%	53.5%

Changes in CSA Products, Business Functions, and Profitability

The CSA model has evolved in recent years through a variety of production and marketing innovations. Part of the survey explored specific additions to the traditional CSA model or whether the CSA has observed a continuation of practices that were commonly associated with the CSA business model.

Changes to Products and Production

Managers were asked to reflect on changes in functional aspects of their CSA from when it began, focusing particularly on a variety of production-oriented activities, indicating whether the type of activity was decreasing, increasing, or did not apply. Specifically, we examined changes in scale, the variety of products offered, incorporation of processed products, season extension, sourcing from other producers, on-farm shareholder activities, and share packing on the farm. These are summarized in table 10.

Table 10. Manager Response to: Changes in Your CSA Operation Since It Began

CSA Production Function	Decreased a lot	Decreased some	Stayed about the same	Increased some	Increased a lot	N
Scale and variety of products offered	7 1.6%	22 5.0%	94 21.2%	194 43.8%	126 28.4%	443
Processed products offered	2 0.9%	8 3.7%	76 35.3%	101 47.0%	28 13.0%	215
Season extension technologies	2 0.5%	3 0.8%	97 25.4%	178 46.6%	102 26.7%	382
Product sourcing from other producers	10 4.5%	10 4.5%	74 33.2%	98 43.9%	31 13.9%	223
On-farm shareholder activities	9 3.0%	30 9.9%	140 46.2%	99 32.7%	25 8.3%	303
Share packing on the farm	13 4.7%	9 3.3%	176 63.8%	45 16.3%	33 12.0%	276

Note: Percent represents of those that indicated the function applied to their CSA

The trend toward increasing scale and variety of products was fairly pronounced and widely applicable. More than 28 percent of the CSAs indicated that the scale and variety of products offered had increased a lot since their CSA started, and 72 percent indicated it had at least increased somewhat. This development suggests that CSAs are discovering certain scale and scope economies in their product lines and are diversifying their product offerings more over time. The addition of processed products was not as widespread, but certainly increasing among those CSAs where processed product had been introduced.

Season extension technologies were also widely utilized and were increasing in use by more than 72 percent of the CSAs using them. Season extension technologies help expand both the scale and scope of products available to shareholders.

Product sourcing from other producers was less common, although the data suggest this practice is increasing somewhat. This is an alternate strategy to achieving product diversification and scale. Participants in focus group interviews voiced mixed opinions about multi-farm CSAs, particularly related to quality control, reputation and customer relations management, and diluting the farmer-shareholder connection (see more on this topic in

the Elmwood Stock Farm case study). Other CSA operators were able to very effectively use multi-farm scale and scope to access markets they would not otherwise be able to achieve on their own (Penn’s Corner Farm Alliance).

On-farm shareholder activities that invite CSA members to visit and/or work on the farm is an historical practice of CSAs commonly used in the spirit of building the community part of community supported agriculture. While many CSA operations still incorporate this to some extent, nearly a third of the CSAs surveyed indicated that these types of activities didn’t apply to their operation. Shareholder packing on the farm and other similar work-for-product type of arrangements, once a common part of the CSA, are similarly becoming less commonplace.⁵

A summary of these production activities across regions and between newer (in operation 5 years or fewer) is provided in table 11. Key regional differences appear to relate to observed changes in season extension – substantially greater frequency of increases in the North Central region of the United States and less frequent in the Northeast. This result may be due to Northeast producers either already having implemented some of these season extension practices or, possibly, reflects differences in production and marketing cultures or observed demand between the regions (see table 6).

5 Only 4 of the 200 CSAs surveyed by Woods et al in 2009 used workshare or barter agreements.

Younger CSAs seem more inclined to adopt processed products as part of their marketing mix and more likely to favor sourcing from other producers than their older peers. Another somewhat counter-intuitive observation is the indication that younger CSAs are more likely to report increasing use of on-farm shareholder activities than CSAs that have been in operation longer than 5 years. It is unclear whether or not these differences in preference reflect differences in targeted marketing strategies or simply reflect changes that naturally occur during the business life cycle of a CSA.

Changes to Business and Marketing

CSA managers were also asked to reflect on how a series of CSA business functions have changed since the inception of their business. Specifically, managers were asked to consider the changes to the sales and profitability of their CSA associated with adding share purchase options, cooperative marketing, flexible payment options, shareholder turnover, shareholder communications, and web-based sales. We then asked managers to summarize the overall contribution of the CSA to overall farm sales and the overall profitability of the CSA. An overall summary from all CSAs to changes in these business functions is summarized in table 12.

Table 11. Proportion Indicating Production Function “Increasing Some” or “Increasing a Lot” by Region and CSA Age

CSA Production Function	Region				CSA Age	
	NE	NC	SE	W	Newer CSA	Older CSA
Scale and variety of products offered	71.6%	76.1%	75.7%	68.6%	71.0%	73.5%
Processed products offered	60.0%	56.6%	64.9%	60.0%	65.5%	54.3%
Season extension technologies	61.8%	85.0%	73.8%	71.0%	70.3%	76.5%
Product sourcing from other producers	55.6%	58.6%	58.8%	58.1%	63.3%	53.6%
On-farm shareholder activities	40.3%	34.1%	46.3%	44.1%	47.6%	34.8%
Share packing on the farm	27.1%	28.0%	31.0%	28.0%	26.5%	29.9%

Note: Percent represents of those indicating the production function applies to their operation. Increasing is relative and not an absolute measure here. “Newer CSA” is defined here as having been in operation 5 years or less.

Table 12. Consider the following potential changes to your CSA sales and profitability since it began – please indicate where they may apply

CSA Business Function	Decreased a lot	Decreased some	About the same	Increased some	Increased a lot	N
Share purchase option (part-season or special shares)	6 1.6%	20 5.5%	135 36.9%	144 39.3%	61 16.7%	366
Marketing cooperation with other producers	7 2.8%	11 4.4%	103 41.0%	104 41.4%	26 10.4%	251
Flexible payment (i.e., installment plans)	2 0.5%	9 2.4%	187 49.0%	138 36.1%	46 12.0%	382
Shareholder turnover	13 3.1%	48 11.3%	276 64.9%	68 16.0%	20 4.7%	425
Communication with shareholders	0 0.0%	11 2.5%	174 40.0%	184 42.3%	66 15.2%	435
Web-based sales	1 0.3%	3 1.0%	92 31.7%	112 38.6%	82 28.3%	290
Contribution of CSA to overall farm profits	13 3.0%	38 8.7%	167 38.4%	146 33.6%	71 16.3%	435
Overall profitability of CSA	11 2.5%	26 6.0%	157 36.1%	197 45.3%	44 10.1%	435

Note: Percent represents of those that indicated the function applied to their CSA

Table 13 summarizes these business functions across regions and CSA operation age. There was some regional variation with more frequent reports of increases in shareholder turnover issues in the Southeast, and relatively greater increases in web-based sales, overall CSA

profitability, and the contribution of the CSA to overall farm profits in the North Central region. Meanwhile, greater CSA age seems to be positively associated with increases in communication with shareholders and web-based sales.

Table 13. Proportion Indicating Business Function “Increasing Some” or “Increasing a Lot” by Region and CSA Age

CSA Business Function	Region				CSA Age	
	NE	NC	SE	W	Newer CSA	Older CSA
Marketing cooperation with other producers	45.8%	47.9%	55.3%	56.4%	51.6%	52.0%
Flexible payment options (i.e., installment plans)	43.2%	53.0%	49.1%	47.0%	46.0%	50.3%
Shareholder turnover	22.6%	16.8%	28.2%	19.0%	19.0%	22.4%
Communication with shareholders	55.2%	58.7%	52.8%	59.9%	53.6%	61.4%
Web-based sales	55.8%	74.3%	69.6%	66.1%	63.8%	70.2%
Contribution of CSA to overall farm profits	47.1%	57.1%	52.1%	45.9%	51.6%	48.1%
Overall profitability of CSA	48.8%	65.1%	54.1%	53.2%	53.9%	56.9%

Note: Percent represents of those indicating the production function applies to their operation. Increasing is relative and not an absolute measure here. “Newer CSA” is defined here as having been in operation 5 years or less.

Evaluating Local Food Market Demand, Competition, and Shareholder Recruitment

Market demand and competition for local food in a CSA's primary trade area can substantially influence the kind of business strategies the CSA employs, its mix of product offerings, and its emphasis on CSA-based marketing compared to other distribution options. Demand and competition measures presumably have an impact on shareholder recruitment and the staying power of the CSA. In the national survey, CSA managers were asked to evaluate the overall demand situation in their immediate trade area and to also rank the relative importance of existing competitors for local food sales. Geographic differences related to regional location and proximity to urban centers were also considered.

In general, CSA managers were very optimistic about demand for local food in their market area. The percentages of managers expecting continued demand growth was very strong – around 25 percent reporting that they expected demand in their area to increase significantly, and 85 percent expecting demand to increase to some degree. Only 3.5 percent of surveyed managers indicated that they expected the current level of demand to decline. These overall results are summarized in table 14.

Comparisons of perceptions of demand for local food varied slightly by region, proximity to urban areas, and age of the CSA. CSA managers in the Northeast were more likely to report local food demand as unchanging or declining. Managers of younger CSAs and CSAs in rural locations also reported less robust demand for local food than their industry peers. This could partly reflect attrition of older CSAs in less-than-desirable market situations or older CSAs that have adapted their business over time to better fit the current market situation. Table 15 summarizes these perceptions.

Table 14. How would you rate the demand for local food in your market area?

Declining significantly	Declining somewhat	Staying about the same	Increasing somewhat	Increasing significantly	N
4	11	48	257	106	426
0.9%	2.6%	11.3%	60.3%	24.9%	

Note: Percent represents of those that indicated they had a basis for knowing demand for local food

Table 15. Local Food Demand Perceptions by Region, Population Proximity, and CSA Age

Demand Changes	NE	NC	SE	W	Rural	Urban	Newer CSA	Older CSA
Same or declining	22.4%	14.0%	14.1%	11.7%	18.8%	11.6%	17.6%	11.9%
Increasing Somewhat	55.3%	62.6%	57.7%	62.6%	58.6%	61.6%	60.6%	60.0%
Increasing Significantly	22.4%	23.4%	28.2%	25.8%	22.7%	26.9%	21.8%	28.1%
N	85	107	71	163	181	242	216	210

Another important issue facing CSA operators is the level of nearby competition for the consumer’s local food dollar in their immediate trade area. To obtain a better understanding of how CSAs view their primary sources of market competition, surveyed CSA managers were asked to rank the relative importance of emerging sources of competition facing their CSA. The overall rankings are summarized in table 16. New CSAs entering the trade area and the expansion of established CSAs in the same trade area were ranked as the highest sources of competition, followed by farm markets. Natural food stores that typically offer both organic and local products followed next in the rankings roughly equal with traditional and high-end grocers offering local food. Restaurants selling local food and home food delivery services ranked near the bottom of the list for emerging sources of market competition.

Interestingly, several of the survey respondents included written comments regarding competition for local food sales, noting that in their area they perceived little threat from competition in the marketplace, as the emergence/expansion of other CSAs and the increased number of retailers offering local foods actually served to raise awareness of local food among consumers and subsequently drove up interest in CSA participation. Consequently, they saw the overall expansion in local food market outlets as essentially complementary to their business rather than a source of direct competition. Other industry representatives noted the importance of establishing a critical mass of CSA operations in order to implement related programs that served to boost demand (Fair Share Coalition and wellness voucher programs, for example).

Perceptions about competition are quite variable across geographic regions, proximity to population centers, and between newer and more established CSAs. CSAs in the Northeast and North Central regions identified new CSAs entering the market as the most significant source of emerging competition, those in the Southeast and Western regions ranked farm markets were ranked as the most significant source of market competition for local foods. Home food delivery services were rated as a source of more significant influence on market competition in the Western region than anywhere else in the Nation.

Table 16. Ranking of the Significance of Emerging Sources of Competition Relating to the CSA

Business	Mean rank	Standard deviation
New CSAs entering the market	3.47	2.16
Farm markets	3.48	2.02
Established CSAs Expanding	3.90	2.23
Natural food stores	4.65	1.99
Other home food delivery services	4.65	2.47
Traditional grocers offering local food	4.73	2.14
High-end grocers	5.25	2.06
Restaurants offering local food	5.87	2.13

Note: (rate highest = 1 to lowest = 8); N = 433

Differences were noted between rural and urban markets as well. Managers of rural CSAs ranked farm markets as a greater influence on local food market competition than urban markets, while urban markets ranked home delivery services and high-end grocers higher than their rural counterparts (using t-tests comparing average ratings between the two groups). Newer CSAs rated natural food stores as relatively greater sources of market competition than older CSAs while older CSAs rated home delivery services as greater sources of market competition than younger CSAs. These comparisons are highlighted in table 17.

Table 17. Emerging Competition Rankings by Region, Population Proximity, and CSA Age

	NE	NC	SE	W	Rural	Urban	Newer CSA	Older CSA
New CSAs entering market	3.01	3.27	3.65	3.76	3.33	3.57	3.55	3.40
Farm markets	3.37	3.42	3.56	3.55	3.26	3.64**	3.55	3.42
Established CSAs expanding	3.66	3.66	4.18	4.06	3.83	3.98	3.74	4.07
Natural food stores	4.67	4.59	4.94	4.54	4.52	4.76	4.43	4.87**
Other home food delivery services	5.21	4.64	4.77	4.33	4.96	4.44**	4.87	4.43*
Traditional grocers offering local food	5.06	4.59	4.59	4.70	4.86	4.62	4.67	4.78
High-end grocers	5.06	5.74	4.76	5.24	5.54	5.02**	5.28	5.21
Restaurants offering local food	5.95	6.09	5.54	5.82	5.69	5.98	5.91	5.82

Note: t-tests were conducted for mean ranking levels for each market type between two group sets for rural-urban and newer-older CSAs. * and ** indicate statistical significance at the 10% and 5% levels.

Following the questions on market demand and competition, managers were asked to evaluate shareholder recruitment for their CSA for 2014 compared to previous years. Overall, about an equal number reported recruitment to be more difficult and less difficult. Table 18 summarizes these results.

As illustrated in table 19, shareholder recruitment was explored across regions, rural/urban areas, and CSA age, and revealed relatively minor differences in responses. The CSAs in the North Central and Southeast regions seemed to have generally less difficulty with recruitment, consistent with the demand observations noted earlier. Newer CSAs also expressed slightly less recruitment difficulty – 35 percent reported recruitment to be “somewhat less” or “much less” difficult in 2014 compared to previous years, as opposed to 20 percent among managers of older CSAs. This latter result is not surprising given that older CSAs presumably have to deal more with replacement due to subscriber attrition in their designated market areas.

Table 18. CSA shareholder recruitment for 2014 compared to previous years has been....

Recruitment Difficulty	N	Percent
Much less difficult	43	11.2%
Somewhat less difficult	62	16.1%
About the same	180	46.9%
Somewhat more difficult	78	20.3%
Much more difficult	21	5.5%

N = 384 does not include 12 that indicated question doesn't apply.

Table 19. CSA shareholder recruitment for 2014 by Region, Urban Proximity, and CSA Age

Recruitment Difficulty	NE	NC	SE	W	Rural	Urban	Newer CSA	Older CSA
Much less difficult	8%	16%	16%	8%	13%	10%	14%	8%
Somewhat less difficult	13%	20%	17%	15%	16%	16%	21%	12%
About the same	49%	39%	44%	52%	48%	46%	43%	51%
Somewhat more difficult	22%	18%	22%	20%	17%	23%	18%	23%
Much more difficult	8%	7%	2%	5%	5%	6%	4%	7%
N	76	88	64	156	164	220	194	190

Cooperation Potential for Multi-Farm CSAs

CSA business model innovations take many forms. They include business models built on a foundation of multi-farm sourcing and/or regional CSA cooperation to either access non-traditional markets or build scale and scope economies to overcome distribution and promotion challenges.

There are a variety of ways farms can collaborate to pursue their CSA mission with both informal and formal partnerships, ranging from informal shared methods of distribution to the creation of formalized cooperatives like those featured as a case study in this report - Penn’s Corner Farm Alliance and the FairShare Coalition in Wisconsin.

In the survey we explored a series of prospective CSA business activities that could potentially involve cooperation, focusing particularly at the level of CSA manager interest in engaging in a specific range of cooperative activities. The survey did not attempt to explore an exhaustive list of potential business functions but rather focused on selected cooperative activities observed in earlier CSA site visits. Specifically, the prospective cooperative business activities addressed in the survey included adding specialty food products, supplementing inventory as needed, shared delivery

practices, shared educational resources, low-income voucher programs, health and wellness voucher programs⁶ and regional recruitment fairs.

Among those CSAs that were already engaged in multi-farm activities, the most common multi-farm activities already being pursued included supplementing new specialty products (27.8 percent) and supplementing inventory when short (21 percent). Relatively small numbers of CSA reported cooperating on recruitment fairs (15.9 percent), low-income voucher programs (14.4 percent), and shared educational programs (11.4 percent).

Interest in pursuing selected multi-farm collaborations was relatively high for several of the multi-farm activities listed in the survey – particularly health and wellness vouchers and low-income voucher programs, where the most common response was “very interested.” Shared educational resources and shared recruitment/promotional fairs also indicated having at least possible interest (or current multi-farm participation) from about 85 percent of the managers. In addition, joint marketing with other producers was on the increase, as noted elsewhere in this survey (see table 12).

Activities where there was demonstrably less interest in multi-farm cooperation included shared delivery and supplementing delivery when short (response was “not interested”). Interest and participation in these selected multi-farm activities is summarized in table 20.

⁶ See also Greg Jackson, Amanda Raster, and Will Shattuck (2011) for an extended discussion of the health insurance rebate initiatives in Wisconsin.

Table 20. Please indicate your interest in cooperating with other producers on aspects of your CSA

Activity	Not interested	Possibly interested	Very interested	Already doing this	N
Adding specialty products I don't carry	104	161	44	119	428
	24.3%	37.6%	10.3%	27.8%	
Supplementing inventory when short	166	124	48	90	428
	38.8%	29.0%	11.2%	21.0%	
Shared delivery	196	149	57	27	429
	45.7%	34.7%	13.3%	6.3%	
Shared educational resources	68	193	119	49	429
	15.9%	45.0%	27.7%	11.4%	
Low- income voucher programs	77	136	155	62	430
	17.9%	31.6%	36.0%	14.4%	
Health and wellness voucher programs	76	139	188	28	431
	17.6%	32.3%	43.6%	6.5%	
Area CSA promotional recruitment fairs	63	178	120	68	429
	14.7%	41.5%	28.0%	15.9%	

Discussion and Conclusions From the CSA Manager Survey

This study represents an important documentation of trends in the CSA business model. The CSA concept has been around for many years. Markets, technology, and marketing strategies, however, have changed, including new opportunities to connect with demand for local food and for farmers to innovate through new products and new forms of collaboration. The traditional CSA consumer has become more diverse, moving beyond a focus on certified organic products and close engagement with the farm.

The data further reveals substantial regional differences in how CSAs are operating and performing. While most managers point to steady shareholder growth, expected continued CSA sales growth and profitability, and strong demand in their markets for local products, there is evidence of variability in this outlook regionally and based on where the farm may be located.

The CSA business model has evolved significantly, as entrepreneurs and market forces have opened opportunities for the implementation of the model in ways quite unlike the early CSA operations. New products, season extensions, multi-farm collaborations, new shareholder groups, marketing collaborations with different organizations, innovative aggregation and delivery strategies, new urban production connections, and health and wellness alliances are among the current trends reshaping the CSA business.



The Changing CSA Business Model – Six Case Studies



The CSA marketing model continues to be adapted to fit many market circumstances. There is room for a diversity of strategies – single farm, multi-farm, co-operatively owned, and even non-farm owned. There is room for a diversity of market targets, including the traditional shareholder who prefers organic produce, but, increasingly, the focus is on using the CSA as a way to facilitate consumer access to local foods in general. Farms and groups of farms are becoming increasingly innovative finding ways to reach non-traditional market segments with CSA shares. This includes incorporating e-commerce, adding products through season extensions, adding shares for alternative product lines beyond traditional produce, and working with urban, health/wellness, and community development partners to access lower income shareholders. The Madison, WI, FairShare CSA Coalition has utilized wellness plan vouchers to substantially expand demand for shares among local farmers and has collectively promoted and provided quality standards critical to maintaining the program. Denver, CO, area CSAs have pursued many of their own innovations with CSA farmers by creating peer-learning opportunities and collaborating with city planners and urban markets. Non-farm aggregation models to deliver CSA shares have been emerging as well, including the Fair Share Combined CSA in St. Louis, MO, where a small food retailer built a CSA business around a shared vision for local foods with area farmers.

These case studies more deeply illustrate observations noted from the national survey on CSA business innovations and marketing trends. The study doesn't propose to document every possible innovation in products sold using the CSA model or provide the full scope of business hybrids that are in some way related to the original CSA concept. Rather, the study provides documentation of innovations and opportunities recognized across a number of CSA communities that could potentially be adapted to other farms or communities with a shared vision. There are many excellent examples of CSA innovators. These particular cases were selected

to illustrate some of the changes taking place and to look with the case subjects at the trajectory of the CSA concept. The competitive landscape is also changing. In some cases, this is a positive for farm-based CSAs; in other cases, it presents a threat. These ideas are examined across a variety of business models and markets.

A case-based approach can be particularly useful for gaining producer and agency perspectives on innovations in the CSA marketing model. We selected a set of CSAs nationally that represented traditional single farm models; cooperatives/multi-farm CSAs; low-income, consumer-targeted CSAs; and multi-farm innovations targeting unique consumer segments with a unique health and wellness marketing partner. We also included CSAs associated with urban market innovations, and a for-profit food hub concept that utilized a CSA aggregation and distribution model. These cases were selected to provide diverse market and geographic perspectives. Through a variety of agency contacts, we coordinated interviews with key informants affiliated with each CSA or CSA community.

CSA Interview Question Themes

The approach used to collect data through the case studies involved a baseline of themes of inquiry. We adapted these to some extent depending on the context, but applied the basic themes to each case. The approach for this study is to use a case-based approach to identify challenges and opportunities for various models and markets for CSAs and to use the case observations as a foundation for a national survey of CSAs to quantify generally some of the things observed in specific cases.

CSA managers, support agencies, Extension and government agencies, customers, and farmers were interviewed with a view toward gaining a better understanding of their perceptions of the changes and marketing/institutional innovations corresponding with their CSA.

The study themes led us to frame the following interview themes, posed in various ways to the corresponding producers, community of producers, and support agencies in order to document the variety of approaches to organizing CSAs for various market environments. The interview themes follow:

1. How has your CSA changed over time? How do you define CSA, and how does that impact the mission and marketing plan for your farm?
2. What have you observed to be the relationship between your CSA and other market channels, and how has this changed?
3. What are your CSA growth opportunities?
4. What do you see as the distinctive advantages for a CSA over other marketing methods? What advantages have you observed for your farm?
5. Are there opportunities for CSAs to collaborate to pursue markets or manage risks? What are some of your ideas?
6. What improvements or changes might occur that could create future opportunities for your CSA? What current/future efforts in local food marketing in your region could create opportunities for other CSA efforts?

The cases are based on producer and market partner conversations and are written conversationally. We provided summary observations for each of these themes drawing on each of the interviews.



CSA Case Study 1

CSA SNAPSHOT: Elmwood Stock Farm Georgetown, KY Traditional Single Farm Model CSA, Certified Organic

Elmwood Stock Farm possesses many distinctive characteristics: it is one of Kentucky's largest CSA operations, is among the State's largest certified organic farms, and is a multi-generational, Bluegrass-region farm that has successfully diversified from tobacco and beef production. Sound management and extensive experience in direct marketing make Elmwood Stock Farm a prime example of a farm adopting a large-scale CSA to deliver certified organic and sustainably grown food to a diverse clientele while maintaining farm profitability.

Farm: 375-acre farm (360 acres certified organic) diversified from family beef/tobacco operation

Year CSA Started: 2005 (40 shares)

Current Size: 400+ shares for 2013

Market: Lexington, KY, metro area

Share Structure: Summer, Fall, Winter shares; beef, egg, poultry add-ons

Notable Products: All CSA products certified organic; strawberries and raspberries; winter shares include farm-brand processed products, like catsup, and frozen berries.



Ann Bell, marketing and customer relations director for Elmwood Stock Farm, served tea on a midwinter morning in the farm's kitchen. It is here where the produce harvest crew eats lunch during picking season. "It's one of the benefits we can offer them," she said.

A lunch kitchen in the middle of their produce packing shed is no surprise; Elmwood is a family affair. Bell and her brother, John, are the eighth generation of Bells to farm near Georgetown, KY. Their father, Cecil, maintains an Angus herd and oversees the farm's hay production. John Bell grows produce, row crops and cattle and manages the farm's labor. Ann Bell focuses on retailing produce through the farm's CSA and farmers market sales. Ann's husband,

Mac Stone, oversees their pastured poultry and sheep production. The farm employs at least one additional full-time employee year-round.

Direct marketing and diversification, and especially managing the farm's labor supply and costs, have driven this CSA's development. "The CSA matches our labor," said Ann Bell. "We have over 400 summer shares, 22 weeks from mid-May to mid-October." The farm has 100 fall shares (September/October) and around 30 winter shares. To make it all happen, the farm employs 12 full-time harvest workers and 4 to 8 part-time seasonal workers. The total labor is similar to what the farm employed when it grew more wholesale produce and tobacco, "but now we're using our harvest labor over fewer acres of vegetables," said Ann Bell.

Table 21. Changes in Elmwood Stock Farm Produce Production

	2005	2015
Total Acreage	60+ produce	37 vegetable; 1-3 berries and high tunnel
CSA	5%	50-55%
Farmers Market	30-35%	30-35%
Restaurant, Specialty Grocer, Multi-farm Buying Club	15-20%	10%
Wholesale –Local Producers Co-op (through 2012) and Supermarkets	50%	5%

Managing labor costs, for example, spurred Elmwood to find more ways to add value to lower grade produce. In turn, those value-added products have helped extend their CSA season. “Just over 50 percent of our produce will be #1, prime for the farmers market and CSA,” said Bell. “So we’re always looking for ways to use our #2s because we already have the cost of harvest labor in them.” Cases of catsup and marinara sauce with a new Elmwood Stock Farm label, processed at a nearby small-scale processor, are stacked in the kitchen this winter day. These tomato products are included in the CSA winter shares, and will help the farm cover the higher harvest and growing labor costs associated with maintaining 100 percent certified organic production. Season extension opportunities are extremely important in order to maintain a relational connection to shareholders. Attrition is a common problem for many CSAs, but Bell is convinced that providing short fall meat share options, using high tunnels, and launching processed products using their farm brand help build loyalty by allowing them to keep a longer presence on the market.

CSA Market Discovery

Elmwood came to a CSA as an experienced produce grower, but that experience was in conventional, wholesale vegetables. Twenty years ago, the farm was producing some 60 acres of vegetables, most sold through a local co-op or delivered direct to grocery stores. In the early 1990s, Bell returned to the family farm and began selling vegetables at the Lexington Farmers Market. By 2005, direct marketing accounted for a minority of the farm’s 65 vegetable acres but was contributing half the profit from the produce enterprise.

“Wholesale resulted in a loss each year in some crops, and that pulled the overall net down every year,” said Bell. The reliability of the profit margins in direct marketing kept Elmwood seeking to grow its direct market channels. Having connected with CSA practitioners through the Southern Sustainable Agriculture Working Group (SSAWG) and other farm meetings, the Bells decided to launch a CSA in 2005. The 40-member CSA became 120 shares in 2006 and grew to 400 members by 2010.

The Bells emphasize that their CSA has not resulted in dramatic increases in net farm income, but it has allowed them to ensure that the costs of vegetable production will be covered. “There’s not a lot of increase in net over the ‘good years’ of wholesaling because expenses of production for retail are higher,” said Bell. “However, there is predictability and consistency from year to year (for the CSA and farmers market), which does equal increased net income over a several-year period. The [net income] reality meets the expectation more often now.”

For Experienced Growers

Elmwood sees the CSA as a progression of both production and marketing experience, and Bell said the model is not for beginners. “Farmers market is the best (entry to direct marketing) because it’s the best learning opportunity – you get the direct feedback, you know how big to pick your okra, you know what the customer’s wanting, you can try out different sizes and varieties, and you learn from the other vendors...if you don’t feel like going, you don’t have to, and you get immediate payment. So for anybody, starting, to me that’s where they need to go.” She also noted that the growth of farmers markets takes the burden off growers to organize and develop the markets while also learning how to sell locally.

Premature entry to a CSA model can be a disservice to both farmers and customers. Bell expressed concern about the management intensity and production risks associated with subscription programs. “I don’t think anybody should do CSA until they’ve grown a couple years. I think you’re doing a huge disfavor by taking their money. You’ve made a commitment that nobody, including yourself, knows you can fulfill,” she said. One of the main hesitations for involving other farms in the marketing of their CSA is the lack of control over quality and supply coming from another producer.

The growth of Elmwood’s certified organic meat enterprises illustrates how the farm has discovered the CSA complements the farm’s sales of other products at the Lexington Farmers Market. Beef add-ons for CSA members are limited to ground beef and roasts. By limiting CSA meat shares to those cuts, “we’ve retained the flexibility that we needed to have in marketing the whole animal,” said Bell. Farmers market meat sales are also higher margin, and Elmwood has seen recent higher demand for organic meat. By limiting CSA meat shares to 75 annually, the farm helps ensure enough organic beef is available for all customers.

Bell noted that offering the CSA meat shares does translate to higher CSA gross sales, but not necessarily greater profitability for the farm’s meat enterprise. “Expenses of selling meat through CSA are higher than expenses of meat at market or freezer meat,” she said. It is more expensive to deliver individual coolers of CSA shares than to pull the meat out of a mobile cooler at the farmers market, where the farm is already selling vegetables.

The greatest growth point for their CSA, in Elmwood’s Central Kentucky location, is that their products are local and certified organic. “Certified Organic has helped the increase in our CSA interest,” said Bell. “Many CSA members do not find a farmers market convenient, so CSA is the option for purchasing local organic [food].”

Elmwood has one final field, 15 of the farm’s 375 acres, that is in transition to certified organic. The farm grows sustainably managed cucumbers, eggplant, and squash in that field. “We let our CSA and farmers market customers know of this distinction,” said Bell. “We expect this to transition to organic in 2014 or 2015, as all of Elmwood has been in a long-term transition from conventional to organic, more acreage each year.”

Season Extension

Greenhouses formerly growing tobacco transplants now produce the organic transplants Elmwood needs. A high tunnel, won from Bell’s entry at a trade show contest, is used for strawberries and tomatoes. Again, labor cost management has driven the CSA’s expansion into year-round offerings. Storage crops, like hard squash, potatoes, and sweet potatoes, help anchor the CSA’s winter shares. “We haven’t done as much with season extension as we might,” said Bell, “because we try to match it with our labor.”

Shareholders

With 420 summer shareholders, there is bound to be turnover. Elmwood has some annual attrition, but does not have a problem filling its shares. “We have heard of some area CSAs that have had trouble filling shares,” said Bell, “but our customer base has stayed full so far.” She attributed that to the farm’s certified organic status.



Certified organic turkeys for the CSA.

Keeping their CSA at full capacity involves more than marketing and communication with customers; it requires offering a consistent, high-quality product. Their certified organic products appeal to many different kinds of customers in the greater Lexington area. The most common value aspects shareholders have communicated with Bell include -

- Desire for local organic food
- Convenience for fresh local product—“They can pick it up in (town); they don’t care about ever coming to the farm; they like the idea of what they’re doing.”
- Peer trial/word of mouth—“Some are doing (CSA) because their friend does it in another city, and they like the idea.”
- Health issues—“Their doctor has told them this, so they’re trying to do everything they can at the last minute.”
- Eating local, connecting to the farm
- Religious reasons from all sorts of faith perspectives —“And some customers are non-religious.”
Different faith-based groups are highly engaged in the local food community as part of their views on food justice, the environment, and food access for the poor.

“Very few (customers) have all of those things,” said Bell. “They’re often competing interests within our whole community of shareholders.”

“And then there’s some that I wonder how they can afford it. A big part of their budget is being spent on this. But that’s because it’s a different priority in their home, and they’ve been with us for years.”

Communication and Customer Connection to Farm

Bell handles all the communication and marketing for the CSA. The farm’s newsletter remains central, and a blog offers more instant updates. “I didn’t realize going in about how big a deal the newsletter is, how much they rely on us (for preparation and recipe tips),” she said.

One of their challenges is matching newsletter and blog content with the content of the CSA boxes. The CSA offers share delivery on 4 days at 12 different locations, including at the farm and the Elmwood farm stand at the Lexington

Farmers Market. That means different kinds of crops may end up in different shares from day to day, with different content required for preparation and cooking instructions in the newsletter.

In addition, some members may want to start thinking about how they are going to use their share before they pick it up. Bell ties the farm’s content on blogspot.com with its Facebook page and anticipates customer needs as much as possible.

Elmwood was among the first Central Kentucky farms to have a website, and blog-style entries continue to anchor the farm’s communication. “We didn’t get on Facebook quickly because we thought it would pass by, but that didn’t happen!” laughs Bell. She is now largely bypassing Twitter but is starting to post some on Pinterest.

In addition to communicating share use and farm news, social media is more important for attracting new, younger customers. “A lot of people that are recently married, usually when the wife’s expecting...then that becomes a reason to eat better,” she said. “And I realize that there is a kind of customer that will be attracted through social media.”

Elmwood also hosts an annual farm day exclusively for its CSA members. Some members—a small minority said the Bells—are very interested in being connected to the farm, even showing up unannounced. On the other hand, many



Ann Bell promoting the CSA at the farmers market.

members would rather not have to travel up the farm's gravel driveways to pick up their food. "Some are (CSA members) because they live here and work somewhere else and they don't like their car getting dirty when they come in the gravel driveway, but they like having the organic food that we grow," said Bell.

Regional Efforts, Multi-Farm CSAs and What is a CSA?

At many levels, Elmwood has vested interests in developing the Kentucky local food economy. Elmwood is Kentucky's largest certified organic farm. Mac Stone is also director of the Center for Sustainability of Farms and Families at Kentucky State University (KSU) and former manager of the KSU research farm. "I train our (farm's) competition," Stone has said. Elmwood is a prominent member of the Lexington Farmers Market, and the farm was a longtime member of the Central Kentucky Growers Cooperative, a wholesale vegetable cooperative that closed its doors in 2012.

For Elmwood, the key opportunities for cooperation include efforts that develop avenues for many growers with differentiated product. This preference may, in part, be attributed to the farm's size and scale of production, supporting all or part of the three family households and more than a dozen employees.

Bell said the preference for developing avenues for differentiated products relates to some of her concerns with "multi-farm CSAs" that deliver orders or shares filled with product from many different farms. In Kentucky, she said, these efforts have so far been contained to the Louisville and Lexington metro areas and more resemble online buying clubs than CSAs.

"CSA is not the reality of what (the current multi-farm model in Kentucky) is doing," said Bell. "Most of this is being done sight unseen, and they're operating out of a warehouse and not off the farm."

In Kentucky, the multi-farm model includes two groups that take orders from customers and ship fresh and value-added farm products from a warehouse setting. "We sell to both of them when we have excess product," said Bell. "But we also don't want to be competing against ourselves." She is concerned that both groups consistently use "CSA" in their marketing. "If there was another name for those type of entities, I think it would be more

realistic about what is happening," said Ann. Blurring the definition of CSA in the customer's mind, she said, creates a challenge for farms that still offer CSA, in some form or fashion, true to the original CSA concept of shared risk between producer and consumer.

Growth Opportunities

Retaining current customers is the main strategy for the future of Elmwood's CSA. The certified organic meat business is growing, and despite the high production costs that accompany certified organic meats, the Bell family sees that as a way of improving future farm profits.

Elmwood Stock Farm also believes it could benefit from advocacy and education specific to CSAs in the Central Kentucky area, much like the well-developed efforts that Bell cited in the Madison, WI, market (case 4 in this report). Bell suggested CSA fairs and regional CSA cookbooks as efforts that could benefit Central Kentucky CSAs.

Another key ingredient in CSA success in Central Kentucky, she said, would be efforts to coordinate a pool of potential employees and farm workers. She said this could potentially be tied to beginning farmer efforts to help those interested in using direct marketing and small farm production assume management or ownership of farms from older owner-operators.

Elmwood sees favorable policy developments for CSA participation, especially related to health and healthy eating, as very desirable. Ann said insurance CSA cost-shares similar to the Wisconsin program would be wonderful, but she also realizes many more local farms offering CSA options would be needed to offer such a service to new customers.

Several CSAs in the area discontinued in 2013⁷. A few others have just started. Grasshoppers, a large multi-farm aggregator in Louisville with a CSA base, had expressed some intent to move into Lexington, but just recently discontinued its venture altogether, citing challenges with scale and operating margins. Grasshoppers transferred its client base to Green Bean Delivery, another local foods distributor selling in the area. The subscription and delivery model continues to evolve for Elmwood. They have maintained a somewhat traditional CSA model but have grown it and adapted it with additional products and longer marketing season.

7 A detailed study on the Grasshopper, Inc., closure of what was formerly the largest multi-farm CSA in Kentucky was completed by Brislen, Woods, Meyer, and Roult in 2015.

CSA Case Study 2

CSA SNAPSHOT: Penn's Corner Farmer Alliance (PCFA) Pittsburgh/Western Pennsylvania Multi-Farm CSA Model⁸

Timeline:

1999	Formed marketing co-op to restaurants; \$16,000 in sales
2003	Started CSA; 10 grower members
2007	Hired Neil Stauffer as general manager
2008-2011	+20% sales growth annually
2012	Added flower, winter CSA program; started processing tomatoes; four full-time staff; acquired 3,800 sq. ft. Pittsburgh warehouse, office, cooler space

2012: Share types: 509 8-week spring shares; 630 24-week harvest shares; 237 biweekly winter shares; 15 flower shares; ~30 egg shares

Shareholder Growth Trajectory: 2007 - 200; 2008 - 400; 2009 - 500; 2010 - 600; 2011 - 700;

Current Size: 36 farms, including 10 farms from an Amish/Mennonite cooperative (Clarion River Organics)

CSA Members: ~700

Other Outlets: Direct-to-restaurant, online ordering
"Farm Stand"

Sales: \$1.4 million in 2012; about 20% annual sales growth 2008-12

Future Plans: Continuing CSA; expand Farm Stand online ordering; dabbling in providing locally sourced foods to universities, private schools; developing gift basket line; adding to value-added food line; encouraging high-end cheese making in the region.



⁸ The authors would like to acknowledge the authorship contribution for the Penn's Corner Farm Alliance case by Miranda Hileman, Extension Associate, University of Kentucky, but also part of the Hileman Farm operation in Apollo, PA that participates in Penn's Corner.

Pam Bryan is bemused by the beginnings of Penn's Corner Farm Alliance. "All I wanted was something to help me sell lamb to restaurants in Pittsburgh!" said the owner of Pucker Brush Farm in Shelocta, PA, 50 miles northeast of Pittsburgh. She and a handful of other small farms got together in 1999, forming a marketing co-op to sell into Pittsburgh. That first year, they sold a total of \$16,000 in product. "We thought it was the best thing ever," said Ken Marshall, also a member of the original group and now board president of the Penn's Corner Farm Alliance (PCFA).

The co-op had sales of \$1.4 million in 2012 with 36 member farms. Revenue has grown about 20 percent annually during the past five seasons. "We had no idea it would ever be like this," said Beth Marshall, Ken's wife. "And it was the CSA that has really driven the growth."

CSA Market Discovery

From its inception until 2006, Penn's Corner remained a marketing co-op that sold product exclusively to restaurants. The development of the Penn's Corner CSA, to reach consumers in the 2.4 million Pittsburgh metro area population, arose as the co-op brainstormed ways to grow income while capitalizing on growing consumer appetites for local food.

"We (the co-op) started off with no money when we formed to sell to restaurants," said Ken Marshall. "We weren't going to put in any capital and instead would take turns doing everything...and that didn't work. Then we were going to work off 5 percent commission, then 10 percent...and that didn't work. Then we went through a series of co-op manager candidates...and it's a crazy job."

The original members of PCFA remember filling orders for restaurants in Pittsburgh, loading them onto a truck in Indiana, PA, and making the hour-plus drive into the city. "Then someone would call that night because the order was a dozen eggs short, and we'd have to drive to deliver a dozen eggs into the city!" remembered Marshall. "It was a tremendous variety of products and an information nightmare."

Members of the group were active in the Pennsylvania Association for Sustainable Agriculture (PASA) and somewhat familiar with CSA marketing. The Marshalls had tried establishing a CSA at the farmers market where they were a vendor in Pittsburgh, and thought it could work for the co-op. So they launched a CSA in 2003.



The Porch Restaurant in Pittsburgh, PA, a Penn's Corner Client.

"We had no idea how hard it would be, just getting shares together!" said the early members. They assembled CSA boxes at Indiana, PA-area farms, then delivered them along with the restaurant runs. Marshall, a retired R&D manager and engineer, designed a spreadsheet to help manage the co-op's restaurant orders. "It was clunky, but it took away 75 percent of the chance for screw-up," he laughed.

Upon a recommendation from one of the chefs buying their product, they interviewed Neil Stauffer for the job of co-op manager, to develop the CSA, in 2006. "We had \$2000 in the bank that we had borrowed to fix the co-op's truck," said Bryan. "When we interviewed Neil, we thought he just might work...so we told him we could hire him for 2 months at \$1,000 per month!"

Having a full-time manager that understood chefs, consumers and farmers was a key point in the co-op developing the CSA program. "Having a manager took the [responsibility of marketing] off of us," said Marshall. By 2010, Penn's Corner had three full-time staff members, and added another full-time employee in 2012.

The co-op's current full-time CSA manager, Karlin Lamberto, said that the CSA market has matured in Pittsburgh, but there are still opportunities for Penn's Corner to grow. "We'll have a pickup location (in 2013) at the Steelers training camp," she said. "We also see working more closely with companies and private schools interested in local products."

The co-op has also streamlined its operations, increasing the efficiency and ease of building CSA shares, when it acquired a 3,800 square foot warehouse, office, and cooler space in 2012. “Having one location to assemble all the CSA shares has been very helpful,” said Lamberto. “It gives us some centralization—we can be putting together shares for another delivery run while the truck driver is delivering to others.”

Penn’s Corner has about 45 delivery locations throughout the Pittsburgh metropolitan area, including their 20 CSA drop sites, something that Penn’s Corner CSA customers say is very helpful. “I like to be able to tell my friends that there’s a delivery location near them,” said one three-year Penn’s Corner CSA member. “I do value the community in seeing other shareholders, and the Penn’s Corner staff, all around town.”

Relying on Experienced Growers

Originally all certified organic or naturally grown, the co-op reached out to other fruit and vegetable growers in the Indiana County (PA) area in 2003, recognizing the need to supply a consistent stream of high-quality product for both the restaurant and CSA channels.

“What grew the co-op was the CSA,” said Beth Marshall. “There is a limit as to how far you can take the restaurants.”

Finding experienced growers can be difficult, said Penn’s Corner staff. Some growers do not want to pay the commission required to maintain the co-op’s staff and facilities. “We’re up to 25 percent for commission. Some people claim that’s too high and they can’t afford it and take it on their own. But I don’t think I can take orders, deliver, collect and do all that’s needed for 25 percent,” said Ken Marshall. Setting a commission rate that will adequately provide for the co-op’s operating expenses is absolutely critical. Other CSA growers with less experience have not been realistic about the margins required to support distribution. This includes good management that can help growers sort through production planning, deal with distribution logistics, manage other PCFA staff, and help with the marketing. As PCFA has grown, it has added key staff to focus attention on the expanding business functions.

Another problem, early on, was that some new members would actually undercut the co-op’s prices to sell to restaurants. New co-ops need to guard against that, said Pete Beccari, a Penn’s Corner member since 2007. “Make

sure there is a rule that once the cooperative is selling to a restaurant, that individual growers from the cooperative are not allowed to undersell the cooperative price to the restaurant or chef. That will kill a cooperative,” he said.

But some of the Penn’s Corner members also operate their own independent CSAs, including Clarion River Organics, a certified organic 12-farm Amish cooperative in Sligo, almost 2 hours from Pittsburgh. Ten farms in the Clarion River Organics co-op are also individual members of Penn’s Corner.

Clarion River Organics, in addition to marketing partnerships with Penn’s Corner for the Pittsburgh market, also sells into the Clarion and Erie markets in northwestern Pennsylvania. Clarion River Organics also has a CSA delivering into the Pittsburgh market, the same territory as Penn’s Corner. “There was a little bit of tension with Penn’s Corner about us taking our own CSA into Pittsburgh,” said Nathan Holmes, Clarion River Organics distribution manager. “But we find that our two CSA businesses don’t overlap much.” And, according to longer time Penn’s Corner members, being able to source from Clarion River Organics has helped provide and stabilize product volume.

New growers are encouraged to join Penn’s Corner and have the benefit of drawing on the experience of the founding growers. PCFA has a \$1,000 initiation fee for prospective new grower members that can be spread over 3 years. Penn’s Corner retains the right to inspect each of its affiliated growers, and co-op members must individually maintain a \$2 million product liability insurance policy beyond PFCA coverage. They recognize they are building and protecting a valued local foods brand for the mutual benefit of all the growers involved.

Quality Essential

“We pretty much beat the bushes to find growers,” said Ken Marshall. “You have to get someone with the right size operation, who is consistent.” All of the PCFA members are selling through farmers markets, on-farm stores, or other direct markets.

Several of the growers have their own CSAs, and they all have their own market outlets as well. “The advantage to Penn’s Corner is for the small grower,” said Beth Marshall. “I always say that if your farm is big enough to buy your own (refrigerated) truck, then you don’t need Penn’s Corner,” added Ken Marshall.

In short, the multi-farm CSA model provides a welcome outlet for many of the smaller farms in the region. The greater scale and scope has helped them to do many things as a co-op with local food marketing into Pittsburgh individual producers could not do. Kevin Jaronski, a new Penn's Corner producer in 2012, said the CSA is crucial to growing his free-range egg farm in Sarver, PA, 30 miles from downtown Pittsburgh. "Multi-farm CSAs are a win-win situation for the buyers and the farmers," said Jaronski, who said selling was not his strong point and that he is very satisfied with the prices that PCFA could get for his products.

Learning the value of having the co-op "sell," the CSA was an important lesson for the original members. "One of the hardest lessons [we growers had to learn] was that we didn't have time to do the selling," said Beth Marshall. "We really rely on the staff," said Ken.

But the key to the co-op's growth is product quality. "You have to have really, really good quality," said Ken Marshall.

All Penn's Corner members received GAP training in 2012, and food safety continues to be emphasized.

Season Extension and Value-Added Processing

Penn's Corner members are all involved in their own season-extension efforts, from high-tunnel greens production to inspected apple cider processing. Two key season-extension initiatives at the co-op level have included tomato processing and the biweekly winter CSA, with 237 shares sold during the winter of 2012-13.

The co-op recently started outsourcing processing of its #2 tomatoes to Stello Foods, a specialty food manufacturer founded in 1990 in Punxsutawney, PA. Prior to this, many growers had no market for #2 tomatoes, and simply composted them. In contrast, during 2012, the co-op's profit from canned products exceeded \$10,000. The products included:

- 3,650 pounds of chopped tomatoes in quart jars
- 3,076 pounds of tomato juice in 10-pound cans for restaurant sales
- 2,508 pounds of tomatillo salsa in small jars for CSA shares

Handling crops for processing admittedly presents the co-op with a new set of challenges, said Ken Marshall. "You are obviously not able to pay a high price for crops that will



Penn's Corner offers a variety of processed product options to their shareholders.

be processed," he said. "And there is a lot of coordination needed between growers to get enough of a batch size to make processing [economically] worthwhile. But our members can see the value in sending some product for processing." Overall, the co-op has found that the inclusion of processed products to their CSA product line is a convenient way to boost grower income, provide some less perishable product options to their shareholders, complement their existing fresh product selection, and enable small producers to offer new items to the Pittsburgh market at a relatively low additional cost.

Expanding both the range of products offered and the length of the marketing window helps Penn's Corner remain competitive. "The main change I've seen (in CSAs) is a change in the number of options that CSAs offer," said Karlin Lamberto. "It started out offering a winter share, then adding on an egg share option and a flower share option. For the first time, this year (2013), we're offering an every-other-week share during the regular season."

Relationship Between CSAs and Food Service Businesses

Penn's Corner original focus was restaurants. While the co-op's growth has primarily emerged through the CSA, PCFA staff—as well as the chefs it sells to—do not see the restaurant and CSA markets as mutually exclusive.

Diversifying the mix of products for the CSA shares has also allowed some growth in the restaurant sales, such as the 10-pound cans of tomato juice packed for local restaurant use in 2012. “I put a lot of trust in Penn’s Corner, knowing that they stand behind their products,” said Kevin Hermann, Executive Chef at The Porch at Schenley, a restaurant located by the Schenley Park “green space” between the University of Pittsburgh and Carnegie Mellon University campuses.

Hermann regularly serves PCFA products, and the restaurant also serves as a delivery point for the CSA. “To me, it’s all connected to having more people eating local food,” he said. “I can’t wait until I can get high-quality local cheese through Penn’s Corner.”

Trevett Hooper is owner and chef at Legume, one of Pittsburgh’s notable white tablecloth restaurants. He said the information Penn’s Corner provides him about its farms is important. “I like the information about the farms,” he said. “I like being able to put Penn’s Corner on the menu.”

CSA Growth Opportunities

Growth opportunities abound for this multi-farm CSA as they build on scale and diversity of fresh and processed products difficult for one producer to supply. They are able to capture efficiencies through collaboration beyond

what would be happening if the 35 farms marketed and delivered separately. The PCFA strives to keep the local farm connection authentic because they recognize this is a key part of the value proposition they provide. The alliance has discovered opportunities to leverage their CSA drop site network to facilitate a la carte purchases and manage more affordable delivery to other Pittsburgh clients outside the CSA.

“One of the reasons that people go with CSA is that they want to support local farmers,” said Beth Marshall.

Extending the options for that support, such as the egg share and a new cut flower share, is important for PCFA.

“Another thing we would like to do is to get people who can’t necessarily afford a CSA share into the CSA,” said Beth.

“We have seen leveling off on the CSAs, but I think that might be temporary too,” said Beth. “If we’re going to grow the CSA, we’re going to have to have more products.”

They are reconfiguring drop sites and CSA distribution.

In other words, becoming more efficient at moving all the CSA shares and products can help streamline the operations—and improve customer satisfaction. The new PCFA warehouse, leased in 2012, provides about 5,000 total square feet crucial to that end.

“It’s not much to look at, but our building we got last year is a major step forward,” said Ken Marshall.

Food safety and quality assurance are also seen as important to the CSA growth. “We already have a tracking system, and that is good for looking ahead to food safety issues,” said Beth. “All of our farms are going to be exempt from the proposed food safety (FSMA) legislation,” said Beth. “But Penn’s Corner is not exempt,” she explained, since Penn’s Corner exceeds the size and sales thresholds to be exempted in FSMA.

They are also looking at some processed foods that put a Penn’s Corner label on products to put on the shelves. These less perishable and branded processed products keep the Penn’s Corner name in the market place longer. But production and marketing of these products needs to be done intentionally. “Our members are glad to find an outlet for seconds,” said Beth. “But it brings its own challenges—when you’re processing seconds, you need a lot of very perishable tomatoes.”



Penn’s Corner offers a cheese share option in their CSA.

One of the fastest growing distribution channels for Penn's Corner is the on-line Farm Store. E-commerce and social media have become very important means for communicating information about products, individual farms, and events. The Farm Store was put in place as almost an add-on for the site primarily directed to CSA shareholders and wholesale buyers. Individuals can order products offered by Penn's Corner producers through the Farm Store a la carte without necessarily having to be CSA shareholders. Product ordered through this venue is distributed along with the CSA weekly deliveries to one of the 20 drop sites around the Pittsburgh area. This arrangement has helped keep marginal distribution costs for the added product very low and the products are accessed with relative ease by individual consumers.

Advantages of Being a CSA and How the Business Model is Shifting

Penn's Corner farmer members have a pragmatic view of what constitutes a CSA. For them, CSA means getting local products from local farmers to local consumers. "Paying at the beginning of the season is important for us and our cash flow," said one member.

"My reason for being in it is to sell the stuff," said Ken Marshall, Board President. "If you don't have the organization, you can't sell your stuff."

Neil Stauffer, Penn's Corner's General Manager, said that CSAs have changed from an emphasis on the farmer to the consumer. "When CSAs were first around, it seems like it was more like customers saying, 'We really believe in you, the farmer, and how can we make this work for you?'" he observed. "Now, it seems like it has shifted and the farmers are saying, 'How can we make the CSA work better for you the customer?'"

Stauffer continued, "Penn's Corner focuses primarily on the farmer. We make sure that what we're selling and the prices we're charging make sense for the farmer. From there, we go and try to find customers who are willing to support what the farmer needs," he said. "CSA is now one of a diversified mix of marketing channels for the co-op."

The value of connection to farms is indicated by some PCFA shareholders. "I like to send my dollars to farms," said one CSA member. "Penn's Corner is like the bridge to the local farm."

It is still undetermined overall how much of a direct connection Penn's Corner CSA members wish to have with the local farm. The co-op has promoted a picnic at

an area farm and other "meet the farmer" events but has been disappointed by the lack of turnout. There is also the challenge of coordinating farmer schedules with CSA shareholder schedules.

Branding can be a unique challenge for multi-farm CSA entities like Penn's Corner. Locavores who place a particularly high value on connections with local farmers are removed one step relationally and by brand. It's difficult to cross-promote farm estate brands directly associated with a specific farm and the collective products from the cooperative. Still, in the case of Penn's Corner, the improved supply connections with restaurants (more products available for a longer period and less interruption of supply) along with the efficiencies of joint CSA delivery seems to outweigh the benefits of the direct connections typical of individual farm CSAs or other direct marketing venues. The traditional cooperative business model seems to be working relatively well in this case.

CSAs and E-Commerce Simon Huntley, Small Farm Central

Not only is Simon Huntley a Pittsburgh-area CSA shareholder, but he also provides website design and product management software to hundreds of CSAs and direct farm marketers across the country. The Pittsburgh operator of smallfarmcentral.com provides a unique perspective into how CSAs can harness technology, and he said that most CSAs including Penn's Corner still need to get to know their members better.

"We definitely see lower CSA retention rates among non-true believers, people new to the whole concept of local foods," said Huntley. "We still need to teach many CSA members how to cook, and I think there will be value in using technology to get feedback on different items in each share." To that end, his company launched a "CSA Farmhand" platform in June 2013 that allows CSAs, large and small, to easily provide specific instructions and recipes while receiving member feedback on share items.

Huntley suspects many newer or "non-core" CSA members will be willing to pay a small premium for such content, and he hopes to pass that income along to the CSAs themselves. "My company exists to help create profitable small farms, and I think the technology can help us create some more income for CSAs through (content management)," he said.

CSA Case Study 3

CSA SNAPSHOT: Farmer Dave's Northeast Organic Farming Alliance-Massachusetts Boston, MA Low-Income CSA Program

Farmer Dave's CSA is a Boston, MA-based program that endeavors to bring CSA shares to residents of low-income neighborhoods. By combining stakeholders from the housing, public health and sustainable agriculture sectors, Farmer Dave's seeks to meet the shared aim of the farm and these urban partners: improved access to organic food, "with a consciousness of reaching low-income and marginalized people." Expanding to multiple sites in its second season, the program has thus far leveraged a team of committed individuals and agencies to create a successful model for delivering CSA shares into low-income Boston neighborhoods.



Farmer Dave's on-farm retail market in Dracut, MA, north of Boston.

Farmer Dave's Sliding-Scale CSA Business Model

Farmer Dave's CSA, in Dracut, MA, is about 30 miles from the low-income neighborhoods being served. The farm is operated by Dave Dumaresq, a Dracut native who returned to farm in Dracut in 1997 after serving as an organic crop extension educator with the Peace Corps in Ecuador. He also completed winter education assignments in sustainable greenhouse in the Republic of Georgia from 2011 to 2013.

With more than 20 CSA delivery points in Dracut and the greater Boston area, Farmer Dave's is able to offer some economies of scale that benefit low-income consumers. The farm started delivering CSA shares to a specific low-income clientele in Lawrence, MA, in 2007. "The key there was that we were offering the CSA to the low-income population but not solely for the low-income population," said Dumaresq, who adds that having customers with various income levels all picking up their CSA shares at the same location makes the program seem more egalitarian. Groundwork Lawrence, the farm's community partner, assists with program administration.

The local administration and support has been crucial for the farm to deliver CSA shares into the low-income programs in Roxbury and Boston. Ginger Turner, Farmer

Dave's CSA Manager, said the administration provided by the East Boston Neighborhood Health Center (EBNHC) helped them enter a market smaller than they might normally. "Alison (Smizer) has built in the flexibility in that program for people paying with SNAP to order shares weekly," she said. The EBNHC makes sure each of the CSA shares is used and paid for—administration that the farm could never justify. "The way the low-income program works for us is having these community partners," said Dumaresq. "They're already there, they're on the ground, and they've been able to put in the time and effort to do the outreach."

Dumaresq said he usually needs 50 shares to justify a delivery into a community. "It's difficult for us to start in a community, but once we start, we tend to stay there because our prices are lower than other CSAs," he said. The weekly share price in 2012 was \$21.50, and that lower share price likely helps Farmer Dave's to be involved in low-income programs. Though Dumaresq is deeply committed to organic and sustainable production practices, Farmer Dave's CSA is not USDA certified organic. Dumaresq, who has an excellent handle on his production costs and market, believes there is plenty of room in the Boston market for a CSA model that utilizes subsidized shares and adapts to allow weekly payment to work, and the farm's growth indicates such. Community partners that understand both farmers and prospective members is the key to making this work. Dumaresq and Turner

have observed a higher attrition rate in the low-income CSA members they have served in Boston and Lawrence, compared to other members. “Sometimes we’re providing food they’ve never seen before, like broccoli rabe,” said Turner. “That’s not very popular in East Boston.”

Dumaresq believes that low-income people might be more willing to enroll in a CSA program if payments could be spread out so that a smaller amount is paid per week, possibly from April to October. “But the Supplemental Nutrition Assistance Program (SNAP) doesn’t want anything paid unless the product is being received,” he said. And because he relies on the community partners to handle payments and then cut the farm a lump check, he has to work within different accounting systems. “At one site, we receive all their SNAP payments as one check at the end of the season because that’s how they’re set up,” he said. While that is far from the CSA model of upfront payments to mitigate risk, “You do what you have to do to make it work.”

Whether low-income or more traditional CSA market channels, Dumaresq said the CSA is not leaving the Boston market any time soon. “I see it as here to stay,” he said. “I think the rate of growth is definitely down, because it used to be in and hip,” he said. Turner, the farm’s CSA manager, agreed that growth is slowing from past years. “But once you explain the CSA model, it resonates with potential customers,” she said.

To keep his CSA sustainable, Dumaresq has focused production on perennial fruit and herb crops to supply future CSA shares and retain CSA members. For Dumaresq, the CSA model will continue to be central to the farm’s marketing plan. “To a certain extent, [CSA] has been a trend, but it’s not going to disappear,” he said. Making CSA work for low-income residents in urban Boston neighborhoods is fully in the spirit of the mission of CSA, but it helps to have partners that can make it work financially.

In sum, the program in Boston marketing CSA into low-income urban communities is successful because of the commitment to health and wellness education from urban community and food relief partners. Staff time and financial cost-sharing lower the barriers to make distribution into these non-traditional markets more feasible.



Loading up the week's CSA shares for delivery.



Reaching Low-Income CSA Shareholders With Urban Partners

“This program just wouldn’t work if we didn’t have the quality of partners that we have,” said Drew Love, Low-Income CSA Program Coordinator for Northeast Organic Farming Alliance-Massachusetts (NOFA/Mass).



Urban CSA shareholder targets reached by NOFA and local housing and authority partners.

Key success factors for this CSA innovation include:

1. Cultivating key agency partners that have a shared mission to help urban consumers gain access to local, fresh food as affordably as possible, in a way that also makes it economically compelling for the CSA supplier farms
2. Developing and facilitating payment mechanisms that work with cash-flow limits of low-income buyers
3. Exploring CSA access health benefits with local health care partners, and
4. Providing program evaluation that can frame the justification for public support.

Begun in two low-income Boston neighborhoods in 2012, the program has a wide range of cooperators. In East Boston, MA, cooperators include:

- Alison Smizer at the East Boston Neighborhood Health Center
- Maria Infante at Project Bread, a hunger advocacy group
- Ginger Carver, Farmer Dave’s CSA Coordinator

Cooperators in the program’s Roxbury, MA, location, at Madison Park Development Corporation, include:

- Lisa Moris at Trinity Property Management, LLC
- Elizabeth Gonzalez Suarez at Dana Farber Cancer Research Institute
- Julie Rawson, Many Hands Organic Farm

Local contacts in both neighborhoods work with Drew Love of NOFA/Mass to educate potential participants about CSAs while publicizing the availability of subsidized CSA shares for the season. NOFA/MASS coordinates share deliveries, while housing authority staff or wellness center staff conduct local educational programs about how to use the shares. Staff at the Madison Park Development Corporation are especially active in incorporating the CSA program into other health and wellness initiatives that have been launched within that community.

In order to make the CSA shares manageable to facilitating partners and affordable to shareholders, the marketing of the CSA has had to be adapted. With the support and cooperation of numerous neighborhood partners from the targeted communities, there have been a few other key steps to making this program work by overcoming traditional barriers to lower income consumers:

• Weekly share payments and Electronic Benefits Transfer (EBT) acceptance

Community partners help collect weekly share payments and process EBT payments for programs like SNAP that can be used to make weekly payments rather than one-time seasonal payments.⁹ The community partners help manage the cash flow and collection at the local level that would otherwise be impossible for Farmer Dave’s. Maria

⁹ CSAs can be licensed to accept SNAP payments, but payment must be made upon delivery of the product and SNAP funds are limited to the kinds of fees and services they can cover. Details on SNAP guidelines for CSAs are summarized at: <http://www.fns.usda.gov/sites/default/files/CSA.pdf>.

Infante of Project Bread said that the flexibility of week-to-week share ordering and payment was key to starting the CSA program in East Boston. “Flexibility is important for the low-income demographic,” she said. “Weekly payments make it easier (for low-income customers) to understand the buy-in.”

Weekly CSA commitments are harder to organize but are key to this clientele, said organizers at both locations. Ali Smizer, who works in the EBNHC Let’s Get Movin’ program, said, “In the past, where we were not asking as much of the members financially, they would sometimes forget, because they weren’t paying a lot.” Smizer provides active leadership with the City Health Center and with schools, including after-school activity and feeding programs. Smizer’s center is one of 35 such centers in the greater Boston area. These programs provide excellent venues to explain the nutritional benefits of products delivered with CSA shares. The pilot program in Smizer’s center looked promising for expansion, but it would require additional producer and urban agency partner coordination.

• **Partial share subsidies**

Both locations offered partial share subsidies in 2012. In East Boston, where the share price was \$21.50 per week, Let’s Get Movin’ provided a \$6 weekly subsidy in 2012; CSA members would pay the remaining \$15.50 weekly. Smizer said the constant commitment was key. “When you come every week and you understand the value of what you’re purchasing, it becomes a weekly routine.” Project Bread is committed to finding ways to continue providing a similar subsidy in East Boston into the future.

In Roxbury, the Dana Farber Cancer Institute subsidized nine full shares, used to provide CSA shares to peer educators for healthy eating. “We used the CSA as an incentive to get people on board with the peer leadership program,” said Lisa Moris, social worker and community educator for Trinity Property Management which manages the properties offering CSA.

The strategy of starting small, with peer educators, seems to have worked in Roxbury. An additional 7-12 shares were offered in 2012, and 10 more shares were added in 2013. “What we know is that if there are community ambassadors of health and wellness that are focused in a holistic way around this issue of preventative care, we tend to have better outcomes,” said Moris. Peers help with

recruiting, cooking demonstrations, delivery, and anything else that can help build the success of the program. Moris noted that the area around the properties served by Trinity Property Management had relatively few fresh produce market options and the CSA boxes were being delivered into a real food desert.

• **Administrative support for share ordering and payment processing**

Administrative support, both in ordering shares and processing EBT payments, was critical for linking the program to farms. Since there is a farmers market at the East Boston Neighborhood Health Center, weekly CSA payments could be processed using the market’s EBT machine. At the Roxbury location, participants filled out SNAP vouchers and returned them to Many Hands Organic Farm, the CSA provider in 2012. Payments for the CSA shares were later deducted from their SNAP accounts.

Having the ability to work closely with neighborhood partners is a key success factor for CSA producers seeking to sell CSA shares to these kinds of low-income households. Ginger Turner, CSA Manager at Farmer Dave’s CSA, said the administrative help with processing the EBT payments on-site is essential for making low-income CSA payments work for the farm. “Ali Smizer in East Boston will swipe the SNAP card for those members, collect the funds—just like she would take cash or check from another member—and then she cuts us a check for the whole amount.”

Such administrative staff time is crucial to the program working for farmers already making many deliveries, said Dave Dumaresq, owner of Farmer Dave’s CSA. “It’s their staff time, and they’ve committed to using their staff time to making that happen,” he said.

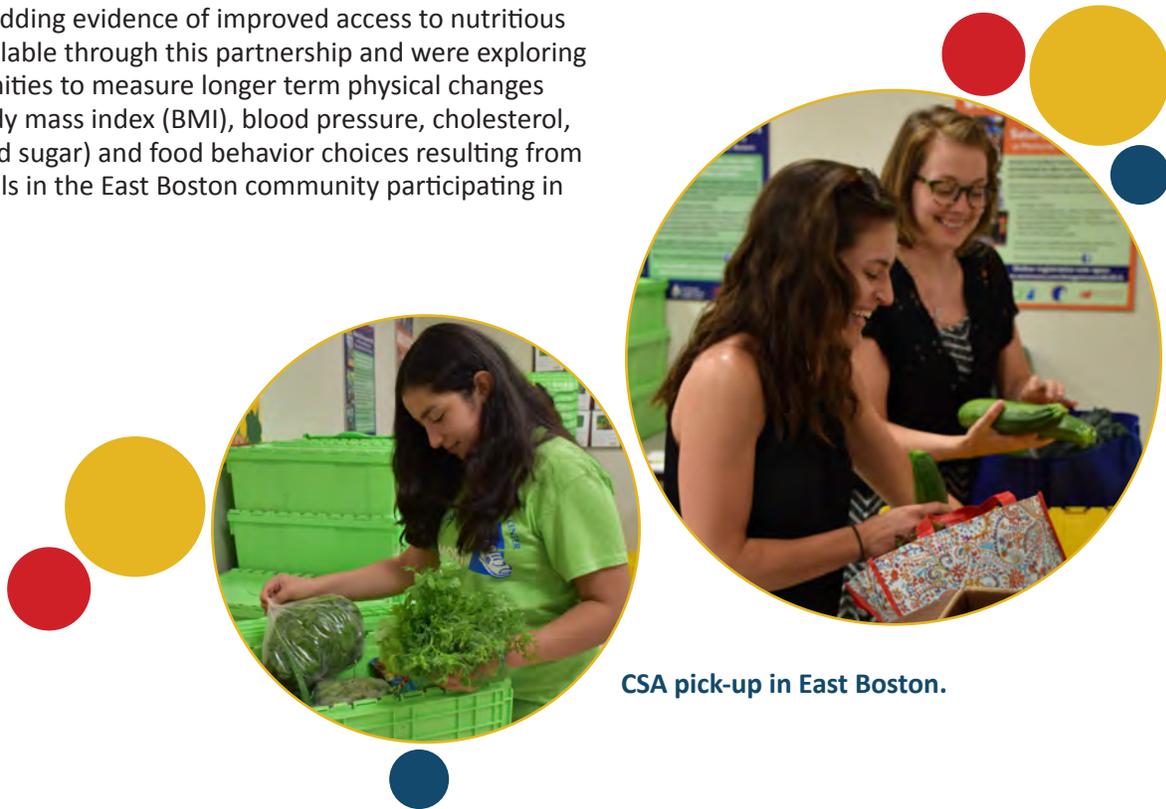
• **Program evaluation**

The community stakeholders, the health care community, and the farms have undertaken program evaluation, each with a slightly different agenda. At the time of the interviews, this was still a very new effort and the approaches to evaluation were just being developed. The results of these evaluations are central to maintaining the engagement of program partners.

Project Bread in East Boston conducted program evaluation with focus group members recruited from the number of low-income consumers that had purchased the CSA shares. Evaluation of the CSA program in the housing units in Roxbury was incorporated into the overall evaluation of the effectiveness of the community peer leaders. Demonstrating impact through increased use and access to fresh and local produce is seen as key to continuing the program.

Meanwhile, health researchers in the Dana Farber Cancer Research Institute focused on measuring the apparent health outcomes of CSA patronage. They were excited about budding evidence of improved access to nutritious food available through this partnership and were exploring opportunities to measure longer term physical changes (e.g., body mass index (BMI), blood pressure, cholesterol, and blood sugar) and food behavior choices resulting from individuals in the East Boston community participating in a CSA.

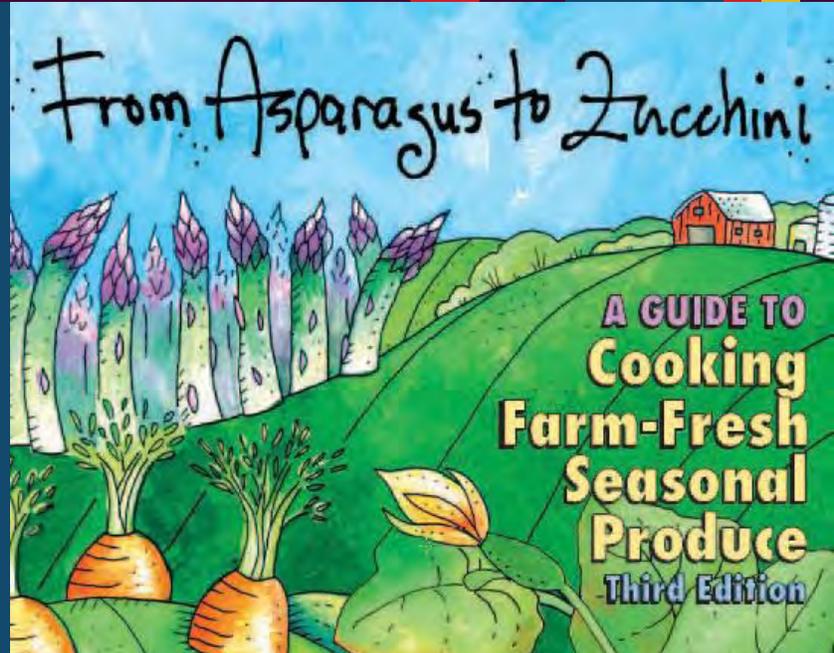
For NOFA/Mass, the success of the program is measured in how the program is duplicated in other communities and how it expands the market for local food. Jack Kittredge, NOFA/Mass Policy Director, operates Many Hands Organic Farm in Barre, VT, with his wife, Julie Rawson, NOFA/Mass Executive Director. Many Hands provided CSA shares for the pilot program in Roxbury in 2012; in 2013, a larger farm closer to Boston provided shares. “There are business opportunities that will be created by some of these programs, and NOFA/Mass welcomes new entrepreneurs supplying local food,” said Kittredge.



CSA pick-up in East Boston.

CSA Case Study 4

FairShare CSA Coalition
Madison, WI
CSA Farm Coalition to Reach Health and
Wellness Demand



Madison Eaters Revolutionary Front – The Beginning

Eight people interested in developing a more vibrant local food system around Madison, WI, met in late 1992 to discuss an idea new to the upper Midwest: Community Supported Agriculture. The group, “Madison Eaters Revolutionary Front,” or MERF, included no farmers.¹⁰

“What was unique was that we contacted a whole slew of farms to see if they were interested in trying CSA,” said John Hendrickson, a member of that original group and now outreach coordinator at the University of Wisconsin’s Center for Integrated Agricultural Systems.

Eight Madison-area farms decided to try CSA in 1993. Rather than remain as a core group for a single farm, each MERF member “adopted” a farm, establishing eight core groups around each CSA. The CSA farms all cooperated, through the coalition. “From the get go, the idea was that these CSA farms would work together,” said Hendrickson.

The Madison CSA coalition, first known as “Madison Area Community Supported Agriculture Coalition,” or (MACSAC), is now called FairShare, and now includes more than 50 CSA farms as members. Much of the growth in farm membership has been the result of expanded

demand, an increase in shared marketing services, and economic gains linked to cooperation around selected business functions. Kiera Mulvey, FairShare Executive Director, said FairShare provides its member farms with strategic benefits in education, marketing, and promotion. “We can do this collaborative marketing and then bring it down to the individual farm,” Mulvey said. FairShare member farms are also able to access highly specific legal and accounting help particular to CSAs provided in local workshops.

This case study focuses on FairShare’s Health Insurance Rebate program for Madison-area HMO members, a program the coalition’s members consider key to the growth of CSA in southeastern Wisconsin. We’re also summarized FairShare’s other collaborative activities, emphasizing the advantages of the coalition’s broad membership and geographic/cultural location.

Cash Flow by Cookbook

From the first eight CSA farms in 1993, the Madison Area Community Supported Agriculture Coalition’s synergetic combination of consumers, advocates, and producers remained committed to open sharing of information about CSA. The goal was to advocate local, sustainable food production in the Madison area. “From the beginning, there was the idea that CSA farms were more than just vegetables,” said John Hendrickson.

10 Hendrickson, John. “FairShare Community Supported Agriculture Coalition...A Retrospective.” <http://www.csacoalition.org/about/history/>.

Still, one of the key developments in the group’s early years was the development of a vegetable cookbook, “From Asparagus to Zucchini,” a resource to help CSA shareholders use their CSA shares. The first edition was a three-ring binder with recipes. “There were tons of volunteer hours that went into developing that cookbook,” said Hendrickson. A bound, second edition soon evolved. The cookbook, now in its third edition, is ordered by CSA farms all over the country. A second cookbook, Farm Fresh and Fast, was published in 2013.

“The cookbook sales provide something like \$70,000 in annual operating capital for FairShare,” said Tony Ends, a FairShare Board member who, with his wife Dela, operates Scotch Hill Farm, located between Madison and Chicago.

Community Connections

While developing resources like a cookbook to benefit member farms, the coalition’s membership grew slowly. When Laura Brown became the coalition’s coordinator in 2005, she did not anticipate that the charge of promoting CSA shares for MACSAC’s 12 member farms would lead to developing a health insurance rebate program that would stimulate the Madison market for CSA shares.

The idea for the Eat Healthy Rebate program originated through a community connection. One of MACSAC’s board members, Kathryne Auerback, was also marketing director for Physicians Plus, one of Madison’s three Health Maintenance Organization (HMO) providers. “To me, the CSA rebate program did not seem like a big deal in terms of getting approval from the HMO,” said Auerback, now an

instructor and program consultant for the Sustainability Leadership Graduate Certificate Program at Madison’s Edgewood College. “The CSA rebate just seemed like the right thing to do to help improve health in various ways for people, farms, and our community, and (Physicians Plus) had the agility to do it.”

Physicians Plus is one of the Madison-area HMOs that University of Wisconsin and Wisconsin State employees may choose from annually as their healthcare provider. The area’s healthcare system is regional, with a low penetration of national providers. “Local providers had the agility to create and launch this kind of community program more easily than a national provider might have,” said Auerback and Brown, as the other three regional providers sought to offer the same benefit as Physicians Plus.

The rebate program had a soft pilot launch in 2005.¹¹ Two of the coalition’s member farms, Vermont Valley Community Farm and Harmony Valley Farm, were the initial providers for the program at Physicians Plus. “We launched it as a pilot to work out any issues before promoting it more broadly,” said Auerback. “One thing we changed was that, in the beginning, some of the rebate went directly to the farm. We modified the administration to simplify the process for everyone, and to reduce any administrative burden on the farmers,” she said.

The year Physicians Plus HMO took the CSA benefit “live,” it was the thrust of their marketing. “It was the main story we were telling in all our marketing and promotion,” said Auerback. “It got a lot of incoming media interest, and we saw a rise in enrollment.”

Table 22. FairShare (FS) Health, Rebate Program Growth

	2005	2006	2007	2008	2009	2010	2011	2012
Estimated total rebates issued	96	972	1,282	3,550	6,100	6,800	7,300	7,200
Approximate # of total shares available via FS farms	2,000	2,800	3,500	4,500	6,950	8,650	8,733	9,700

11 The rebate is coordinated between the insurance provider and the wellness program of participating firms. Employees are offered a rebate voucher based on household size that can be redeemed through participation in any FairShare CSA. The voucher provides for part of the season share cost for the shareholder and is provided on a reimbursement basis. Additional details on the health insurance rebate program can be viewed at the FairShare site: <http://www.csacoalition.org/about-csa/csa-insurance-rebate/>.

The impact on area CSAs was even greater. “After that first year, the farmer members sold out their shares,” said Auerback. Barb and Dave Perkins, who operate the 1,250-member Vermont Valley Community Farm, said that the entrance of other HMO companies was key. “Every year, suddenly there was competition between providers,” said Barb Perkins. “We saw our membership grow, and the rebate program really helped.” Rebates issued leveled out at 7,300 in 2011 and 7,200 in 2012 even while the number of CSA shares available from FairShare farms have increased. Growth in the program and the impact of the voucher program on total shares in the area are noted in table 22.

Health Rebate Program Keys

One of the keys to the program’s success, said Auerback, was the coalition’s ability to vet farms to qualify. “We (Physician’s Plus HMO) did not want to be in the business of determining which farms were bonafide CSA farms using sustainable practices,” she said. FairShare’s ability to vet farms was viewed as key by Physicians Plus, she said. Another key success factor was having a critical mass of CSA options and a choice of farms for voucher holders in different parts of the community through the coalition’s networks.

Kiera Mulvey said that the principle of streamlining administration for both benefit providers and farms extends beyond the health rebate program. “Our Partner Shares (low-income rebate) program is primarily funded through a “Bike the Barns” benefit ride between member farms,” said Mulvey. “But processing and administering the 200 Partner Shares is staff-intensive, and I doubt that many farms would find the time to do it on their own.”

Until 2013, all four Madison-area HMOs provided a CSA rebate (\$200 for a family, \$100 for an individual). One HMO discontinued the CSA program in 2013 in favor of an alternative health-tracking program. Interviews with FairShare member farms indicated mixed views on whether that development could portend a scaling-down of the rebate program.

Mike Noltnerwyess, a Madison-area native and a fifth-year CSA operator, said he is “lucky” to be farming near Madison. He said the health rebate program has undoubtedly increased demand for CSAs. “I think I would still fill my shares (without a rebate program),” said Noltnerwyess who, with his wife Cassie, operates a 300-member CSA. Like most of FairShare’s other members, they also retail at farmers markets and wholesale some organic produce. “If the rebate went away, there would have to be some effect (on the CSAs), he said.”



Some of the providers that participate in health rebate programs.

The qualifications for a farm to receive the CSA rebate are set by the insurance company. As of 2013, two Madison-area HMOs also accepted CSA reimbursement from another, smaller farm coalition, FRESH. “The HMO that limits its rebates to FairShare farms has told us it’s doing that because it doesn’t want to make things any more complicated,” said John Binkley. The 28-year-old farmer at Equinox Community Farm is a member of both FairShare and FRESH, the smaller of the two groups. The main difference between the two groups is that FairShare now requires its members to be USDA certified organic or transitioning to USDA certified organic, while FRESH does not have this requirement.

Outlook and Producer Perspective on Health Rebate Program

Producers and insurance providers agree that FairShare plays a critical role in the health rebate program’s success. “As more companies came on board, we continued to serve as an intermediary and encouraged the companies to be as similar in their programs as possible,” said Mulvey.

A transition by the insurance providers to online sign-up for the CSA reimbursement helped both FairShare and the HMOs to streamline administration. “We transitioned in 2007/08 to work even more with the marketing departments,” said Mulvey. “The downside is that the CSA rebate may not be as integrated into the HMO wellness program,” she said.

That lack of integration bothered some FairShare members from the beginning, said Laura Brown. “The voucher program was tremendous,” she said. “But many farms felt they were getting members that weren’t good CSA members,” added Brown. That is, new members attracted by the health rebate were not as invested in knowing the farm and the farmer and are less likely to exhibit loyalty to a certain CSA. “You wouldn’t think that people would shell out \$600 for a CSA membership and not know the farm name,” said John Binkley, “but we’ve heard that story from different farms more than once.”

In general, FairShare and its members see that lack of connection as both a departure from the original CSA values and an opportunity to “put the community back in CSA.” That may be seen in perspectives from four FairShare’s younger farmers:



Crossroads Community Farm CSA, is a member of the FairShare Coalition in Madison, WI.

Kristen Kordet, owner of Blue Moon Community Farm and a FairShare board member, said her CSA’s 88 percent retention rate is tied more to her emphasis on building member community than any health rebate incentive. “I’m somewhat unique in that all my members pick up at the farm, and they build their own shares by selecting their own produce,” said Kordet. “But that is my preference: to be very connected to my CSA members. CSA has allowed me to farm in this way.”

Dennis Fiser and Anne Drefahl are FairShare members from Jefferson, about 30 miles from Madison. They are focused on growing their CSA, Regenerative Roots, through marketing to their local area. “Our goal is to really provide food for the people in this (Jefferson) community,” said Anne. But the CSA rebate program does help that effort. “A lot of our CSA members work in the Madison area, so they’re eligible for the rebates,” said Dennis. But these second-season farmers see more benefit for them in the networking available through the coalition. “Just knowing the other farms, having people we can talk to about CSAs, that’s huge for us,” said Anne.

Mike and Cassie Noltnerwyess operate Crossroads Community Farm, a few miles from Madison. Mike noted that the CSA program has, in his view, spurred the growth of so many CSAs in the Madison area. He thought that their 300-member CSA would still fill without the rebate program, and he also sees huge benefits from FairShare beyond vetting for the rebate program. Specifically, he is involved in helping develop communication from members about production practices and other on-farm issues.

Other Functions of FairShare

The health rebate program and the cookbook continue to be major activities of Madison’s FairShare CSA Coalition. Kiera Mulvey, the Executive Director, said the group is continuing to focus on other strategic, education and marketing/promotion activities. There is also a great deal of benefit to the expertise within the coalition, with much information sharing from the coalition to farms and farm-to-farm.

“Our strategy is mainly to coordinate the expertise that is out there,” said Mulvey. “We have 50 farmers, and 30 of them have more than 10 years organic growing experience. So we’re really focused on grower-led production-based workshops.” FairShare has also started having its members submit annual “fact sheets” of new ideas that they adopted and that worked. Business development resources for CSAs have been made readily available through Wisconsin Department of Agriculture programs. Consequently, FairShare focuses on production education and facilitates a few social networking events for the farm members each year.

Strategically, FairShare has shared a part-time staff member with Dane County Extension. Laura Witzling works as Institutional Food Market Coalition Coordinator. Housed in Dane County’s Extension office, half of her appointment is focused on, and funded by, FairShare. “I work with institutional buyers to determine sources and new markets for local products,” said Witzling. Carrie

Edgar, Dane County Extension Department Head, said Witzling's appointment allows both Extension to leverage resources and benefits the large number of CSA farms in the county.

FairShare also provides a staff member to administer the Partner Shares (low income) program, some 200 of the total 9,700 CSA shares available in the Madison area in 2013. "You really need a staff person to administer Partner Shares," said Kiera Mulvey. She also cautions that the group's activities, including the unique health rebate program, take advantage of many of the characteristics within the region. "Just because this worked in Madison doesn't mean it will work other places," she said, qualifying her comment by noting that institutional support could significantly help to replicate the program in other regions.

Both FairShare staff and farmer members said that the advantages to the coalition are very strategic. "We have the capacity to leverage a lot more," said Kiera Mulvey. It is easier to represent a public benefit than individual farm benefit, and that allows FairShare to gain access to innovations like the health rebate program.

FairShare also continues to market and promote the CSA model in the Madison area. "We can do this collaborative marketing and then bring it down to the individual farm," said Mulvey. "The non-profit exists to educate and tell why CSA is good," she added. The farms then benefit as more members sign up.

Future of FairShare CSAs

Southeast Wisconsin is unique, east of the Rockies, for its concentration of CSA shares and number of farms focused on CSA marketing. But transitions and future trends seen by the FairShare CSAs are similar to those in east coast markets. "We're seeing a lot of people adding value to their shares," said Mulvey, noting offerings of bakery goods, cheese, coffee, and even organic fruit from North America in off-season shares. Meat is another emerging product in the FairShare CSAs: beef, pork, chicken and some lamb.

The FairShare Coalition provides a unique multi-farm CSA initiative that creates shared business function but also strives to maintain the uniqueness of each CSA farm. Wisconsin CSAs are also building their capacity for utilizing technology with Internet signup, ordering add-ons, and other products. The Milwaukee market is viewed by some FairShare members as underserved, and although the Chicago metropolitan area market may also be underserved by CSAs more competition exists there from other subscription and produce delivery services.



CSA Case Study 5

Innovations in Denver Urban and Urban Fringe Markets
Denver, CO, area

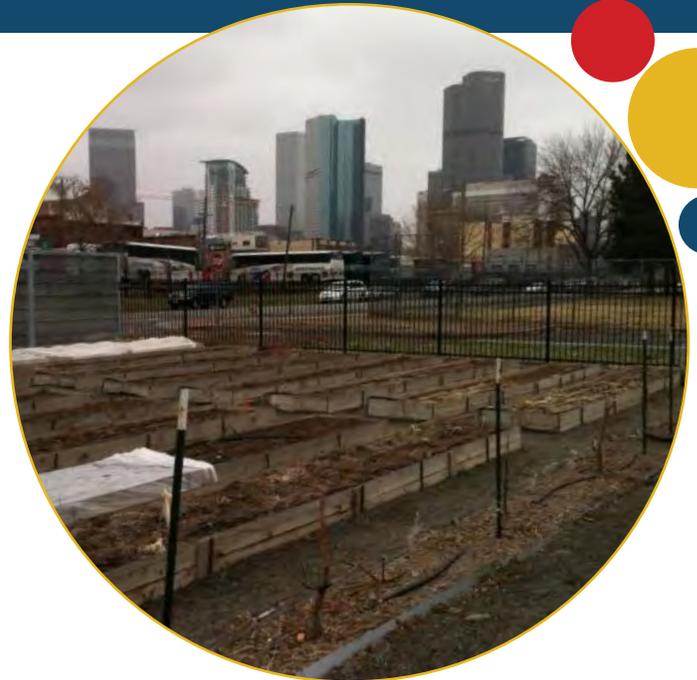
CSAs and Urban Agriculture

Community Supported Agriculture operators in the Denver, CO, area regard their market ripe for new and expanded CSA operations but remain concerned that growth needs to be strategic, given land, water, and market infrastructure constraints. Affluent, health-conscious consumers in the Fort Collins, Boulder, and the eastern suburbs of Denver have contributed to a multiplication of CSA and local food distribution in those localities. Meanwhile, CSA is playing a role in marketing plans for urban farms sprouting in downtown Denver.

This case will summarize two CSA approaches in Denver: an urban farm in downtown Denver and a farm focused on CSA production on city-owned land in suburban Arvada. It also presents a summary of a broader set of key issues facing CSA operators in Denver, based on a focus group conversation with CSA operators from the greater Denver area in April 2013.

Granata Farms, Downtown Denver, Elaine Granata

Granata Farms may be at the epicenter of urban farming in the Rockies. Reclaimed, repainted shipping containers house the wash and packing facilities for Elaine Granata to deliver food to 20 CSA members and a host of restaurants and local grocers. Granata's CSA farm is located on the site of a demolished Denver Housing Authority (DHA) public housing site. "The soil was awful," she said. She has a multiple-year lease with the agency, has constructed an extensive series of raised beds, and she said her farm is likely not to move. Granata benefits from support from the Denver Housing Authority (DHA) and said the agency has given every indication her farm site will continue even after the back half of the lot is developed into new housing. "We're being painted as an amenity to new housing," she said. But while agency and community



Granata Farms in the shadow of the Denver, CO, skyline.

support may offset some capital costs, urban farming has its risks. "Vandalism is real," she said, grimly recalling an incident where someone defecated in her tomato beds. "I've had several power tools stolen, and the greenhouse had a \$1,600 equipment theft one time."

Granata shares the site with a greenhouse flower grower and another CSA, run by a non-profit with local youth providing labor with a vocational development mission. "It is challenging, when I'm selling raspberries for \$4.50 and the non-profit has them for \$2.50," she said. "I think it creates confusion to the public about what this food is worth."

Pricing discrepancies are nothing new to CSA operators. Farmers across the country have noticed lower CSA prices from those operations that are less tuned to their costs of production, which are operating CSAs more for lifestyle or hobby purposes, or are simply less business savvy. Granata is far from a hobbyist. Like several other Denver urban farmers interviewed, she is well in tune with her

costs of production. “I made \$6.35 an hour last year,” she said, “but I also view what I’m doing as having considerable community benefit, and it is a model for what urban farming can be.”

Granata said her CSA customers are more likely to connect with her because of desire to connect with their food and to let their children know where food comes from. “I’m not sure that the (urban farm/community) mission speaks to many of my shareholders. A lot of them will say they want their kids to know where the food comes from. I would say maybe half of them get the local food thing...the others, it’s a commitment to their kids.”

Her CSA is the focus of her farm. “The restaurants understand that I have a CSA and that’s my priority,” she said. “I rarely have to recruit for the CSA. I have a 90-percent+ renewal rate. I pamper my people at some level. I am there (in-person) for (each) distribution, and I tell them the name of the tomato and I give them a recipe.”

Now in her 12th year as a CSA operator, she sees her hourly wage improving from its 2012 level. “A part of my mission is to make a living wage as an urban farmer,” she said.

Star Acre Farms, Arvada, CO CSAs and Planned Urban Development Initiatives, Jackie Raehl

New farmers in the West can find accessing water a challenge as great, or greater, as accessing land. “My first farm was basically a three-acre plot of land in someone’s front yard,” said Jackie Raehl, co-founder of Star Acre Farms. “It was irrigated with ditch water.”

Access to more land and more reliable water, in part, attracted Raehl to a call for proposals for a CSA farmer to lease land on a 15-acre city park site in the city of Arvada, a suburb about 10 miles northwest of downtown Denver. “The city already leased land for hay and grazing,” said Jessica Prosser, the city’s sustainability coordinator. “We thought ‘why couldn’t we lease some land for vegetables and see how it goes?’”

Raehl’s proposal was accepted and, with a business partner, she began Star Acre Farms. The four-acre CSA farm is located beside a four-acre community gardens site, directly behind a large suburban development in Arvada. The site is part of Arvada’s city park system, and much of the site’s general maintenance is funded through that city department.

For Raehl, operating a CSA on city-owned land has brought her CSA to the next stage. “The biggest questions we got (at their first CSA site) were: can we come see your farm? Do you guys have classes? Can I bring my kids?” she said. Her Arvada site is built around community participation; some terms of her lease with the city even stipulate community outreach and involvement in exchange for favorable lease terms. “That’s how the city was able to address some legal concerns with leasing parks land to a for-profit business,” said Blake Angelo, Colorado State University Extension.

Being on city land has its benefits. The farm pays the city’s internal water rate, a 30- to 40-percent discount over municipal rates. And the city has helped establish some permanent infrastructure on the farm, including a building to be used as a farm stand with a cooler. “We found the freezer in city property that was not being used,” said Raehl. She also said that the city advertising the farm as part of its parks program has been beneficial. The farm also partners with the adjacent community garden, providing plants and seedlings for sale to the gardeners.



Star Farms leasing land in a planned suburban community outside of Denver, CO.

But the public-private partnership also brings challenges to the CSA farm. “It’s a 3-year lease, so we haven’t invested in a lot of perennial crops yet,” said Raehl. Because the farm is located on city park land, there can be issues related to access that disrupts the production site. “People come around, they might bring their dogs, they might not understand the difference between the farm and the garden,” she said. “We do offer tours and ways people can come out and see the farmer and do volunteer days so that they can feel that it’s their farm.”

Raehl believes that the sense of community ownership is crucial for the farm’s success at its current site. “We’re trying to cut down on our farmers market attendance and then kind of expand our farm stand offering here,” she said. “We really want to be the super local farmer for a (customer base) one to two mile radius from here.”

Issues for Denver Metro CSAs

Community Supported Agriculture operators in the Denver and Colorado Springs areas faced a major opportunity in the spring of 2013. The country’s largest CSA, the 4,500-member Grant Family Farm CSA, went bankrupt during the winter of 2012-13. That created a potential pool of thousands of “CSA orphans” in the area.¹²

In early April 2013, 10 CSA farmers, as well as 2 local food processors who offer a preserved foods CSA share, gathered at a Denver restaurant to lend their perspectives on accomplishments and challenges for the area’s CSAs. Farm sizes ranged from an acre to a large orchard operator whose CSA shares accounted for 10 to 15 percent of sales. While only one farmer who attended marketed solely through CSA, all the operators said that they viewed their CSA as a major growth opportunity for their farm and business.

Partnerships Viewed Essential to Growth

Farmers noted several ways that CSA farms are engaging in formal and informal partnerships, especially to help expand and diversify the products offered through CSA shares. A common way was offering Colorado-grown fruit



One way CSAs expand is to offer fruit from orchard regions to metro areas, sharing the profits with CSAs that provide delivery of the fruit.

from the State’s orchard region located some distance from metro Denver. Key to that relationship, said the orchard representative, was providing value to the CSAs that provide delivery of the fruit share. “We understand that our partners spend time and effort in obtaining those members for us, so we share a profit with them.”

Partnering with farmers outside of direct marketing is another approach one CSA used. One farmer recalled how a neighboring beef farm was really struggling. “We asked him if he would grass-feed a beef for us, because we were strictly vegetables. And now he’s doing more, he is branding through the CSA. It’s really been helpful to him, and it’s been beneficial to us because now we can offer some things that we just aren’t able to grow.”

Many of the farms represented had either processed products or encouraged their CSA members to patronize MM Local, a Denver company processing local farm products. “We put a sticker on every jar, that tells the name of the farm that grew the produce in that jar, so people have a connection,” said company personnel. The company said a major portion of its sales come from a CSA-type share sold annually.

¹² The Grant Family Farm CSA is a complicated legal story that, according the Denver Post, filed three bankruptcies and has had a series of on-again, off-again efforts to try and jumpstart one of the nation’s largest organic CSAs, a diversified products cooperative aiming to provide shares throughout the greater Denver area. (Miyoga, 2013). The multi-farm was still active, targeting organic produce, poultry and eggs through CSA and wholesale distribution in 2015.

Unconventional partnerships with landowners who provide a farmer with access to land and water are also a part of several successful Denver CSAs. One farmer utilizes production from about 20 urban yards. Other farms, such as the two profiled in this case, utilize city or agency-owned land which was otherwise underutilized, so it was in less direct competition with development interests.

Peer-to-Peer Learning: Building Farmers Programs

All of the focus group farmers had participated in the Building Farmers program, a local variation on the USDA Beginning Farmers and Ranchers program; some had served as instructors. “Building farmers is like a business school for farmers,” said one. Participants give especially good reviews for the peer-to-peer learning used by the program. “To hear from someone who has been in the field and done that is really helpful,” said one alumni.

Younger CSA farmers in the group agreed that learning from more experienced CSAs is critical, even for those coming to their CSA with prior farm and garden backgrounds. “I think (Building Farmers) is really important, because farmers used institutional knowledge that was passed down through families, and very few of the people I see starting farms have any sort of knowledge that they grew up with, or very little,” said one young farmer.



Farmers markets give potential CSA customers a chance to sample farm products.

Changes in CSAs over Time

Producer CSA experience in the focus group ranged from 4 years to more than 20 years. Obvious changes in CSAs, they said, included the move toward more producer delivery as well as a wider consumer exposure to the CSA concept. “We have come to the point where we don’t really try to sell the CSA too much. We feel like in this area there is a pretty big understanding of CSA,” said one farmer. Other farmers noted that more education about what CSAs are is still needed. Any consumer education that can come from outside the farm such as that from university and government agencies, said some, is welcome.

There were mixed responses to whether CSA shareholders have changed in what they value over time.

- “I feel like it’s almost unlimited the number of customers we could sell to. It’s more a matter of how many relationships we can support.”
- “Customers are not looking so much for a sense of ownership but a sense of belongingness.”
- “You have to have a foundation where you are returning a fair value, because from that point then you can have a real relationship. People that stay do have absolutely a feeling like a member of the farm, a part of the farm.”

Relation to Other Market Channels

Most farms were involved in one or more farmers markets, and those markets contributed to the growth of the CSA. One producer noted the marketing function their farmers market stand provides for their CSA: “I really feel like the farmers market served as a place for people to sample our product before they got to the point where they invested a larger amount of money.”

The CSA market channel, noted one producer, eases transaction times and costs for the farmer. “We have drifted toward increasing the CSA aspect of our farm because it’s more convenient for us, we have found.” For larger farms, CSA is an important diversification tool. “We strategically diversify our marketing. We rely on farmers markets, CSA, wholesale, and then we process as well.”

Producers also note the interaction between wholesale production, whether for larger grocers or small restaurants, and the CSA. “The way that wholesale comes together with CSA is really nice, because we can grow a lot and we can grow more of something than we think we can sell through the CSA. We have a production buffer, but we made a commitment early on that CSA would always come first.”

Relationship was emphasized by the producers. One newer CSA producer said, “Most of our relationships are at farmers markets. And sometimes we would sell out of things and then customers that were so loyal for so many years would come up. So I wanted a way to say, ‘I will always have it for you.’ And the CSA format provides that.”

The CSA also offers growers some flexibility. “The CSA is a chance for me to do some experimenting,” said one producer, laughing. “If I want to grow something new and I’m not sure that other markets are going to buy it, I think, ‘well, I can always give it to the CSA.’ It’s clear to me that the CSA is always the priority, but I also grow certain varieties for my (wholesale) customers too.”

Perspectives on the Future of Denver-Area CSAs

Many CSA producers are committed to the cultural and community benefits they believe CSA brings to their customers. “We recreate the culture, creating community around food,” said one producer, who talked about their perceived need for CSAs to be more integrated with providing food to underserved and underprivileged populations.

Meat, eggs, and dairy were seen as products where CSAs in the Denver area could grow. “It has significant growth hurdles, with processing and all that, but there are significant growth opportunities in meat that are still untapped,” said a grower.

Regional collaboration between CSAs is also seen as a growth area for the future. Groups like FairShare of Madison, WI, could help with marketing the CSA to new consumers, said one Denver-area producer familiar with Madison. “FairShare is a place that you know as a consumer you’re going to be joining a CSA that has a track record. That kind of vetting is super important.”

Collaborative efforts could also benefit growers who need specialized supplies or pieces of equipment. “We need a potato plow once per year,” noted one farmer. In addition, a CSA community could help coordinate donations to community groups and food banks. One farmer noted a common frustration: “There are days when I have extra everything, and it’s at the height of the season when everything is so busy, and I don’t have that one person to call to say ‘Can you come over today and pick up these four coolers worth of food that I have to donate, because it has to be emptied right now, because I have to empty my cooler to put the new stuff in.”

Finally, growers noted that there may be a shift in the way that CSA farmers are viewed by larger produce operations. “We actually have direct connections with a lot of people that bigger farmers do not,” noted one farmer. That could be used to benefit the entire Denver and Colorado community of farmers on issues where farms large and small find common ground, issues like land and water accessibility.

CSA Case Study 6

CSA SNAPSHOT: FAIR SHARES COMBINED CSA (CCSA) St. Louis, MO Multi-Farm Sourcing by Entrepreneurial Non-Farm Food Retailers to Deliver CSAs

Distributes local food in weekly and bi-weekly shares to members in Greater St. Louis, MO

Year CSA Started: 2008 (started at 170 shares, reached 225 in 1 month)

Current Size: 350 shares in 2013; 2014: 450 shares

Share Structure: 46-week full share (\$52.75/week); 26-week half share (\$54 per week); also offers “Gardener” share for shopping a la carte to former members; items available a la carte; various installment plans (up to 10 payments); share value is \$50 per week (plus tax)

Notable Products: Many value-added local products; sources local meat from variety of farms; fresh pasta; non-Genetically Modified Organisms and gluten-free items.



An Innovative Local Food Retailer

In 2007, St. Louis natives Sara Hale and Jamie Choler shared a CSA membership. While shopping at the Maplewood Farmers Market to supplement their CSA share, the sisters – also active in the Slow Food St. Louis group – wondered if there could be a way to more easily combine a “market basket” of local food products. The following year, with 170 first-time members signed up, Sara and Jamie launched Fair Shares, a CSA providing fresh and preserved local food to its members. The business now serves 400 members and staffs 6 employees.

“In a way, what we’re doing is really self-serving,” laughs Sara Hale. “We’ve found all this great food and now we’re sharing it with others.”

At its core, Fair Shares is a local food aggregator and distributor. Sara Hale and Jamie Choler note that is different from the traditional CSA model, where members share the risks as well as the benefits of the farmer. Fair Shares notes on its website limitations, such as limited

variety or overabundance. “Fair Shares, being a Combined CSA (CCSA), gathers food from a plethora of farmers, offering fantastic diversity with little risk,” they say.

The business was developed with both financial sustainability and development of a local food culture (in Greater St. Louis) in mind. “Membership in Fair Shares is a commitment to the farmers so they have the security of knowing what we ask them to grow will be sold. We’re sharing their risk and their bounty, and we’re encouraging more farmers to grow food (vegetables), instead of commodity (corn, soy).”

Building Suppliers and Shareholders

Hale and Choler remember plenty of skepticism as they approached area farmers in 2007 to gauge interest in supplying products for the type of combined CSA they envisioned. “The first season, we were barking up all these farmers’ trees and it seemed like they were thinking,

“You girls don’t know what you’re talking about,” said Hale. “And now they’re giving up farmers market and selling directly to us so that they don’t have to stand outside for four hours on a Saturday morning.”

While the business does not provide money before the season to farmers, they are paid upon delivering goods at the 2,700 sq. ft. storage and distribution point located at the confluence of I-44 and Kings highway, right outside Washington University’s medical complex in St. Louis. That likely helped dispel the initial farmer skepticism. “It’s a lot of paperwork, because we pay them each week when they bring us the food. And they love that,” says Hale.

Sara and Jamie were not new to starting businesses; Hale worked for St. Louis’ Schlafly Beer for 16 years, helping to grow the first new brewery in St. Louis since Prohibition. Choler, a social services professional in the health industry, was interested in getting people to eat better. Hale and Choler had started a small, natural-bath product business when the idea for a combined CSA hit. “I quit my job to work on it full-time, and Jamie worked part-time from November until the season started in April 2008, when we were then both on over-time” said Hale. Their sister, Lindy Sullivan, has worked for Fair Shares since 2008.

They sold 170 memberships before the first season began, growing to their first-year goal of 225 members within the first month of being open in 2008. Like a traditional CSA, the sisters discovered relying on local sources

opened them up to risks unknown by commercial produce wholesalers. “2008 was a flood year,” remembered Hale. “It seemed like all we had the whole summer were zucchini and squash. It’s a wonder anyone came back!” She adds, “And I had to forget all my Excel spreadsheet (product flow) projections.”

Still, the timing was good. Interest in local food was increasing in the St. Louis region in 2008, and the midtown area where the sisters were based was especially ripe with interest. “I think what helped make Fair Shares so successful is the local connections that had been developed over the years, with knowing the farmers through Slow Food, and all the resources through connections at the brewery.” says Arianna Aerie, who is married to Choler’s son, Kevin Warner. Aerie and Warner joined the Fair Shares staff in the 2010 season, after moving to St. Louis in 2009.

Changes in Customers, Business

Hale and Choler note that the business is now quite different from their original intent, which was to benefit lower income families. “We really thought we were going to start this and be a 501(c)(3); we thought we were going to be a non-profit and really help some low-income families get good food,” said Hale. Choler, who had observed dietary challenges among some of her social service clients, said this did not occur. “We had a number of families that were going to come and get their free shares. But they just stopped coming. They didn’t know how to cook the food.”

In order to maintain a viable organization and business, Hale and Choler had to shift from their original aim of bringing local food to those who could not afford to eat locally. They also discovered a market reality that discovered them: only a minority of CCSA customers wished to be connected to the farms growing their food.

“Everything that we put into the shares has the farm name on it,” says Hale. She says that, while there are some customers who do care about where the food is grown, there are not nearly as many customers as they thought. That’s not to say all customers don’t care; one, says Choler, tells them, “This is like having your best friend do your grocery shopping for you.”



Fair Shares CCSA makes sure the name of the farm is on every item in a share so customers know where their food originated.

Kevin Warner says they have seen the kinds of members change. “It’s like the lazy locavore sort of thing,” he says. “The first members were really into doing their own canning, cooking, connecting with the food. There’s a whole different population we’re serving now, there’s been a big shift. Which is weird to deal with, because they’re not as tolerant of things that aren’t perfect.”

Growing Local Food Culture

While Hale, Choler, and their employees were at first surprised at the relative lack of interest among their customers in connecting with their farmers, promoting that connection remains central to their business. “We do what seems like thousands of hours of research each year into where our products are coming from,” says Warner, “and our members know that we’re doing the legwork for them.”

That has benefited some farms, creating improved relationships between Fair Shares and its farmer-vendors. “A number of our customers shop at the farmers markets and they do make the connection, and the farmers love to hear that they’ve bought (that farm’s) products through Fair Shares,” said Hale.

Becoming a sort of clearinghouse for local products – a food hub – has also helped Fair Shares advance its goal of increasing locally produced products. “Our fresh pasta supplier is now using our local eggs,” said Hale. “That’s more money from that pasta that is staying in the local economy.”

This helps Fair Shares in St. Louis meet its original goal. “We want everyone to eat this food,” says Choler. “And one of the ways we’re progressing is we’re getting farmers to grow food for us that was just not available before,” says Hale. “We have more and more farmers asking ‘What do you want us to grow for you? We’re going to start this, we’re plowing out this field...what do you want us to grow?’”

Producer Perspectives

Fair Shares CCSA, in St. Louis, sources local food products from farmers, market gardeners and food manufacturers of varying sizes. Within an hour, on a Tuesday in October 2013, the CCSA received a box of coffee from a local boutique coffee roaster; several boxes of shiitake and oyster mushrooms; standard commercial produce boxes



Fair Shares CCSA receives product from producers varying in size from gardeners to large-scale farms.

packed with tomatoes, squash and other items from a 100-acre vegetable and livestock farm west of St. Louis; and two boxes of winter squash from a 1 ½ -acre market gardener nearly an hour and a half away. Sellers of all sizes are attracted to Fair Shares immediate payment and willingness to work with food producers of various sizes.

With his family, Rusty Lee raises 20 to 30 acres of vegetables on their farm in Truxton, MO., 60 miles northwest of St. Louis. The farm’s vegetable sales are about 60 percent wholesale and 40 percent retail. The farm used to focus entirely on wholesale tomato production and diversified into retail in 2008. Lee Farms now operates a farmers market stand in Lake Saint Louis and has its own 132-member CSA.

The farm is certified by PRO*ACT – a third party quality assurance certifier that facilitates food safety programs for foodservice distribution. Its wholesale accounts include a distributor on St. Louis’ Produce Row, and it supplies produce to St. Louis’ Whole Foods stores. The 100-acre farm also raises livestock and poultry, leasing additional crop acreage to grow corn and soybeans for livestock feed. A St. Louis artisan tofu-maker customer requested the farm supply non-GMO tofu soybeans in 2013; Leey planted two acres. “We’re able to try smaller markets like that,” he says.

Interestingly, Lee Farms has operated its own CSA since 2008, when it started selling to Fair Shares. “We were all at the same CSA meeting that winter!” says Lee. Neither he nor Fair Shares staff said competition is created; this may be mainly due to their focus on different trade areas. “I was kind of surprised at the popularity of our CSA in our local area,” says Lee.

For Lee Farms, Fair Shares is a niche customer, sort of a high-end wholesale account. “I consider Fair Shares part of our ‘retail’ sales, because the prices paid are still at that level,” says Lee. He coordinates his Tuesday deliveries to Fair Shares with St. Louis drops for the farm’s CSA shares and deliveries to other St. Louis accounts.

Lee says that prices paid by Fair Shares have adjusted downward since 2008, as more local growers have supplied the business with product. “But it’s still worth it for us to sell here. The prices are still above regular wholesale prices, and I’m already coming into the city to make deliveries,” he says. Lee also appreciates the delivery-day payment. “That’s very different from your typical wholesale deal,” he notes.

Bob Lober has grown vegetables for sale to St. Louis-area restaurants since 1996, at St. Isidore Farm in Moscow Mills, MO, about an hour’s drive north of St. Louis. He focuses on specialty, heirloom crops and extends his sales season by supplying crops like lettuce and beets. Formerly an information technology consultant, Lober has devoted his full time to producing about one-half acre for sale to restaurants during the last 11 years.

Fair Shares is Lober’s only current customer that is not a restaurant. He says he has appreciated being able to increase the product volume sold to Fair Shares since CCSA began in 2008. “They take a lot of different products and are fair in pricing,” says Lober. Delivery-day payment is also a plus, he says, especially for smaller and beginning farms.

Keys to Success

Hale and Choler both reflected on what they would consider to be the keys to success for this type of retailing operation – these would include the following:

- Partnership with farmers – gathered feedback on product sourcing and payment, structured how requested
- Local ties – local roots gave credibility and promotional clout in St. Louis, MO, area

- Backup farmers, for when regular suppliers have crop failures or fall short
- Good member services—allowing swaps/trades of non-produce items to accommodate families who are vegetarian, vegan, gluten free, etc.
- Good relationship with Eat Here St. Louis, local wholesale business supplying local food to restaurants/chefs. Pool orders on items requiring bulk quantities or across-state shipping.
- Knowing the numbers. “We’re not making CEO salaries here. Our markup started at 25 percent, then 30 percent and now it’s 32 percent. And our health insurance is eating good food.”
- Deciding distribution based strictly on member demographics. “When we started, we let the members decide (where the pickup would be).”

Tips and Considerations for Enhancing CSA Success Through Strategic Business Practices

CSAs are diverse in their business models and generally adapted to their surrounding markets and business opportunities. It’s very difficult to offer simple formulas for success that apply everywhere. Interesting patterns are emerging however as observed in the national survey and case studies that might be useful to consider as part of a strategic business model for CSAs moving forward.

Production and Product Mix

- Season extension technologies add scale, scope, and market presence. Protected agriculture systems can also improve consistency of quality for weekly deliveries.
- More value-added products are being added as complements to traditional fresh produce offerings. Such products can better utilize overproduction and seconds while contributing farm- branded products that shareholders can hold longer.
- Product line diversification beyond fresh produce (eggs, meat, flowers, etc.) can be used as either higher value shares or separate specialty shares to add value and appeal to shareholders.

- Sourcing specialty items from trusted partners can be used as a means to supplement product offerings when these partnerships can still support the CSA mission. Quality and consistency need to be managed carefully in these circumstances.

Marketing

- The CSA requires considerable marketing and relationship building skills as an advanced direct marketing option, in addition to complex production planning – not really lending itself very well to farmers just starting out with direct marketing.
- More CSAs are using partial shares and payment options, moving away from the single early-season payment as a means of better accessing shareholders with their own cash flow challenges.
- Complementary product lines can be developed for CSAs that help product development designated to other direct to consumer or retail customers.
- Partnerships with community groups that are focused on food access, nutrition, youth, urban land use planning, or food education/food justice can be used to create important marketing relationships to reach new consumer groups. Many agencies have the existing personnel resources and funding in place that can be leveraged to reach non-traditional CSA clients.
- Partnerships with wellness programs to pursue voucher and other CSA promotions have substantial potential for building shared marketing objectives locally.
- A number of fee-based e-commerce service providers are available specifically for CSAs adopting on-line payments, more advanced logistics, and other web-based business functions that are important to CSAs.

Distribution and Logistics

- Some CSAs can pursue collaboration to consolidate packing, grading, cooling, and delivery. While maybe not formally organizing to the extent of Penn's Corner or FairShare, infrastructure resource sharing can still be pursued to manage post-harvest and distribution costs.
- CSA drop points can be leveraged for spot farm market "a la carte" purchases utilizing on-line ordering for both existing shareholders and interested local patrons.

- Peer-to-peer CSA farmer learning can help new farmers realize efficiencies sooner and identify feasible target markets and distribution options.
- Many CSAs have identified local food retail partners (restaurant, farm markets, food co-ops, etc) willing to help find various logistics solutions.
- Innovative food retailers and food hub concepts are increasingly available and open to partnering with farms to distribute shares and help with some of the intermediate marketing services.

Communications and Customer Service

- Most CSAs are very active already with social media. E-commerce applications are increasingly being developed to help better service shareholders with supplemental purchases, product information, food pairings, and other services that could be considered part of a larger customer relations management program.
- Newsletters and other communications that highlight unique aspects about the farm, farm activities, and other community-building efforts are still highly valued by shareholders.

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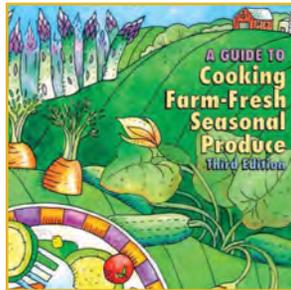
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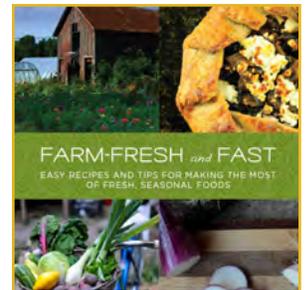
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