

## Ensuring the Sustainability of Oregon's Statewide Farmers' Market Association

Analyze and identify the economic, geographic and infrastructural factors that have contributed to the long-term success and failure of various farmers markets in the State of Oregon, and explore the role(s) that a statewide farmers market association might be able to play in enhancing the stability of farmers market operations through networking, information exchange, and strategic planning.

[Final Report](#)

## USDA FMPP Grant

### Final Report

Dec. 10, 2008

Grant ID #: \_\_\_\_\_

Grant award: \$67,692 to Oregon Rural Action, of La Grande, Oregon

Time frame: Sept. 10, 2006 – Sept 25th, 2008

Implementation: Karen Wagner, Project Manager

### **Project Title: "Ensuring the Success of the Statewide Farmers' Markets Association"**

#### • **Summary of the issue or problem examined: *A Will but less Way...***

The overall purpose of this project was to "create a sustainable statewide farmers' market association able to hire and support a permanent half-time director and to develop and offer reliable services that directly support to both markets and farmers". The FMPP proposal anticipated a project team and board participation in the activities and implementation of the grant, in coordination with the contracted project manager. (See Appendix for work scope and timeline.)

#### ***FMPP Project Goals:***

- Formalize OFMA business structure and complete federal tax-exempt status
- Write a three-year strategic plan with Board of Directors
- Create a plan for Board maintenance and development
- Develop a funding plan for a permanent half-time director
- Formalize partnerships with OSU, ODA, DHS
- Seek new partners, for example, Oregon Hunger Relief Task Force, Oregon Food Bank, Kaiser Permanente and other health care providers, Local Food Policy Councils, microenterprise networks, and regional economic development districts

The pre-existing condition was that, though twenty years old, the Oregon Farmers Markets Association (OFMA) like many non-profits, is under-developed, under-resourced and under-committed. Throughout the state, farmers' market expansion and membership needs are growing at a rapid rate with little or no advocacy, legal and/or financial support, and very limited infrastructural support in the form of partnerships or sponsors. The Association is a state-wide, volunteer-run, "virtual" organization, meeting only quarterly by telephone, providing basic services (web presence, state-wide farmers' market brochure) as a recognized umbrella organization for markets to gather under, but unable to undertake internal organizational development or expansion activities, much less implement greater member support, benefits or services.

The primary challenge: Within the initial project team there was a will and vision, but with transitions and loss to the board very early on in the project implementation what little internal capacity existed was used to maintain “life-support” for the organization, rather than taking on anything new. The Project Goals were the obvious tip of the iceberg in regards to perceived needs and tasks, but the ‘how’ and ‘by whom’ remained the larger, less tangible - people and resources - portion of the iceberg that needed to be addressed along the way.

The FMPP grant provided a tiny but devoted human resource, the project manager, who, along with other supporting resources and recruited expertise, was able to take on this valuable and large-scale task. The Project Manager donned many hats in helping OFMA to reorganize and develop the organization (strengthening internal capacity) along with the more externally-focused market support goals that derived from research and relationship-building.

The purpose of the grant was a pretty tall order for 18 months. However, with an additional 6 months beyond the originally proposed 18, now 24 months total, the activities and objectives for this project were have been completed or initiated in a very optimal way.

• **Descriptions of how the issue or problem was addressed: *Renewal, outreach, research, planning and relationship building***

The Oregon FMPP grant project addressed the challenges and goals in the following ways:

- 1) Renewing of OFMA - internal capacity-building. Expand the board of directors (from 8 market managers to 15) to include broader skills and more community representation; review and refine its mission, purpose and operations; increase involvement of its members in key roles, communication and affinity groups (“regional market networks”); complete tangible business elements of OFMA, including the completion of their non-profit status process, grant and funding identification, improved service implementation and program development.
- 2) Conduct outreach and research. Market constituencies and stakeholders gave input via several types of surveys and sharing opportunities. The stakeholders included market managers and organizers, market farmers, the OFMA board of directors, and other states’ farmers’ markets associations. The data-gathering occurred in interviews, web-based surveys, market visits, electronic discussion groups, market managers’ forums and regional meetings.
- 3) Products and Reports. SWOT (strengths, weaknesses, opportunities and threats) analyses, combined with other qualitative data from each group, combined as the basis for a 3-year Strategic Plan for the organization. The Plan identified and

prioritized four Key Focus Areas and spurred the development of support committees with work plans geared to implement the Plan. Ancillary plans (e.g. Board Succession, Financial), processes (administrative and operational), and organizational development activities are underway with a more invested and expanded set of directors able to take charge while working toward hiring staff.

- 4) Relationship-building. Outreach and data-gathering created face-to-face opportunities for relationship-building, sponsor and partnership development, and improved communication channels to develop between stakeholders, members and OFMA.

• **Specific contributions of project partners: *ORA, OSU, ODA, OFMA, Omy...***

The *de facto* project partners included the Oregon Rural Action, Oregon State University Small Farms Extension Service and the OR Dept. of Agriculture. The relationships were either grant stipulated, as in the OR Rural Action’s case, the non-profit fiscal agent and project manager employer; or historical, assumed, non-binding, and undefined, as with OSU Extension Service, the Dept. of Agriculture and the Dept. of Human Services. These organizations have had long-standing interaction with and support of OFMA, much to OFMA’s benefit, but without formal recognition or commitment.

The expanded FMPP outreach increased the Association’s presence and relationships with all the above entities in a very positive way. From technical advice, work group participation and advocacy, to very specific supports, new avenues of interaction, recruitment for new Board positions, partners’ contributions have expanded productively. And while the partnerships have not been “formalized” in the way that might have been envisioned, e.g. MOU’s, direct financial support or resource contribution, for instance, between OFMA and its project partners; nevertheless, the trust and working relationships have expanded and with care will only improve.

In specific: The research and expertise of the OSU Small Farms Extension program faculty was invaluable, providing input to the surveys and analysis, support and maintenance of the state-wide farmers’ market list-serve (which saw dynamic usage as relationships and communication increased around the state), and technical market information and tools relating to the business of market management and success. This year marks an expansion of direct OSU support with the development of an education and training track for specifically for market managers at the annual Small Farms conference.

The Department of Agriculture provided context, coordination and communication with technical assistance (FM directory development and distribution), work group and policy development and education, and outreach for the farm-direct producers in the form of new food safety courses to be delivered in coordination with farmers’ markets around the state, which came in part, out of conversations with OFMA over the past year. At the

recommendation of ODA, OFMA has established an advocacy committee that is in direct communication with the state office in charge of rule and standards, regulation and licensing to influence and advocate for actions that support small farms, farmers markets and the whole of the farm-direct agriculture sector. This is a major development and hugely supported by OFMA members.

This year a long-time ally, the Department of Human Services, who has traditionally partnered with OFMA to deliver the WIC and Senior Farm Direct Nutrition Program (FDNP) has expanded the relationship to include contracting with OFMA to administer a windfall of state funds designated for farmers markets to improve health, hunger and nutrition statistics in Oregon. This was possible only with the increased internal capacity and organization of the OFMA developed with FMPP implementation, and stands to benefit many markets and customers around the state as well as the Association.

A new connection that may bear even more fruit is with a private corporation, *New Seasons, Inc.*, a local retail food store chain partnered with OFMA member markets to expand the food stamps program. This example stands as a great model for others to be involved in funding of local food access and availability.

Over the course of the project, many more contacts were made and/or solidified. It is anticipated that this is just the beginning of new opportunities and services. With new representation on its board, and as members of the organization, OFMA is positioned now to seek new partners in, for example, Oregon Hunger Relief Task Force, Oregon Food Bank, Kaiser Permanente, insurance providers and so forth.

• **Results, Lessons Learned and Conclusions: *OFMA as microcosm of FM's in general; internal vs. external development; sustainability as a state of mind?***

This was a grand-scale proposal with more components than could be completed by one person, which became the emerging reality of the project. However, with an additional 6 months several organizational pieces came into place which allowed the major components - and *intentions* - of the FMPP grant to be met. Original goals were amended along the way to meet the reality and circumstance of the Association.

This was the first lesson learned – Find out what is *really* possible given all the facts (and the “undiscussables”) - go where the energy and actual opportunities exist, pick the low-hanging fruit, be flexible make sure ‘the pieces fit before cutting the cookies’, in your grant prep and implementing activities.

It made sense to prioritize certain of the original goals, which have been completed as marked-√. But other elements didn't quite fit the grant timeline, given the circumstances. Those (especially the supporting plans) have now become part of the OFMA committee

work plans, the optimal place for this work to be completed and proper ownership achieved.

**FMPP Project Goals :**

- Formalize OFMA business structure and complete federal tax-exempt status - *in process*
- Write a three-year strategic plan with Board of Directors ✓
- Create a plan for Board maintenance and development – *in process*
- Develop a funding plan for a permanent half-time director – *in process*
- Formalize partnerships with OSU, ODA, DHS ✓
- Seek new partners, for example, Oregon Hunger Relief Task Force, Oregon Food Bank, Kaiser Permanente and other health care providers, Local Food Policy Councils, microenterprise networks, and regional economic development districts, etc. – *in process*

We back-tracked more than a bit but the final outcome is good; the new and incoming board is more capable now than ever of doing for itself what has been envisioned and outlined in the 3-year plan, and seems poised to complete those items ‘in process’ and more.

**More Lessons Learned**

Absent clear alignment, clarity of purpose and perfect consensus, anything relating to people and process takes time, much more than anticipated or planned for, generally. This project outlined several timely “technical” tasks, all of which depended on the presence and input of people, in addition to the project manager, if they were to be owned and implemented by the organization. Changes in people and power (literally) meant that the first sub-task at hand was to find more hands to lighten the load, more minds invested in the vision and mission, and to renew the internal capacity of the organization.

In organizational development terms, time and money invested in process, change management and people management are well spent, but often the biggest challenges to both funders and the non-profits implementing the world’s “good causes”. Organizations *are* people and the status of the people matter at least as much as the tasks those people are meant to carry out. An organization may neglect its own internal health (symptoms include volunteer burn-out, board discord or apathy, management challenges, unclear decisions, functions or expertise, chronic financial fatigue) in favor of trying to provide services and activities on behalf of its public image and members. We continue to work through and between the *internal* organizational needs as well as the *externally-focused* services and cause-related issues.

**Macrocosm – Microcosm, chicken or egg...?** Is the FM Association an outcome/product of its membership, or the mother of them? Is it making “market” eggs, or nurturing those eggs, or is it an egg itself?? The project brought to light the interesting, though hardly

novel idea, that OFMA is both greater than the sum of its parts, and a microcosm of the whole FM world that it represents. In other words, as we embarked on this project there was a lot of pressure to implement the research to determine what services and benefits the membership wanted and needed. And what was discovered is that OFMA needed these same things - a more diversely representative board, with skills to manage a “non-profit community business”; resources to carry out the basic organizational functions with appropriately paid staff, visibility, credibility and stability. In short, the OFMA needed to consider and manage for its success just as a market must, paying attention to 3 critical areas – “atmosphere, community, product” and applying the ‘market management matrix’ thinking (OSU market management models, 2004 © ). “What’s good for the goose - is good for its eggs”, meaning as OFMA learns to use those and other tools for its own growth, it can also share with greater credibility with its member markets as part of their on-going development, education and training.

### **Conclusion**

The discoveries and final outcomes of the FMPP showed first and foremost the need for expanding INTERNAL organizational capacity, helping the Association to first don its own “oxygen mask” before attempting to serve its membership. The grant project manager acted variously as servant, consultant, leader, go-fer and/or “director pro tem”, identifying and implementing actions to bring the Association to a place of readiness and internal sustainability. These activities included board expansion and development, development of organizational documents, processes, plans and operations, not to mention developing the Strategic Plan with potential funding sources, services and programs.

The larger, EXTERNAL challenge is to determine what services and programs would be appropriate and implementable for the organization, and to deliver those services that will best serve its membership and the market sector in a sustainable way, over time.

### **OFMA as a Sustainable Organization**

How well did we succeed in the overall project goal to: “create a sustainable statewide farmers’ market association able to hire and support a permanent half-time director and to develop and offer reliable services that directly support to both markets and farmers” ?

Sustainability has yet to be assessed or proven, but the Association is now well prepared to renew itself, its people, processes, and programs as the times dictate. (See addendum for the 10 characteristics of that.) And though there remain a couple of plans to be written by the ever-expanding board and committees, we have achieved the following:

### **Current or future benefits to be derived from the project**

- Expanded organizational and board capacity
- Enhanced communication tools, operations, systems, practices and protocols
- Deepened trust and relationships within the Board, with members and partners

- Increased awareness of issues, needs and opportunities – leading to program development
- Regional networks and a community of markets (“communities of practice”)
- A more clear means of involvement and support of the Association
- Food safety courses for farm-direct producers to be delivered in coordination with ODA, OFMA and farmers’ markets around the state
- Contracted services with a long-standing partner that brings much-needed capital to both the markets and the Association to make good food more accessible and available
- Farmers markets and market farmers better recognized as viable agricultural entities possibly as part of this project’s efforts
- Improved positioning for the Association to serve the broader farm-direct sector, the food security and safety movement, and “relocalization” efforts

**Recommendations for future research needed, if applicable**

- FM Insurance policy development for markets, vendors and boards
- Exploration of the standardization of farmers’ market guidelines
- Market ethics related to operations (“buy local”
- Consistent and useful non-profit incorporation support with IRS
- Longer-term implications of urban development, population pressures, and climate change
- Optimizing the current food security and food systems

**Additional information available (publications, websites)**

OFMA Website: [www.ofma.org](http://www.ofma.org)

**Contact person for the project with telephone number and e-mail address.**

- Karen Wagner, 541-278-7971; [kwagner@wtechlink.us](mailto:kwagner@wtechlink.us)
- Val Blaha, 971-237-7576; [val@mossbackfarm.com](mailto:val@mossbackfarm.com)

Addendum

Table 1 *Original Timeline*

<b>First quarter</b>
<ul style="list-style-type: none"> <li>• Compile lists of current and potential partners</li> <li>• Initiate contact with partners to identify common goals and opportunities for crossover programs</li> <li>• Analyze current funding status and begin search for potential funding sources</li> <li>• Review existing market research from OSU</li> <li>• Design market outreach and research plan</li> <li>• Develop database to record and summarize research</li> <li>• Begin outreach to markets – visit and interview market organizers and community-based partners statewide (anticipate this will be a four month process)</li> </ul>
<b>Second Quarter</b>
<ul style="list-style-type: none"> <li>• Complete outreach to markets</li> <li>• Define and establish regional networks</li> <li>• Develop responsive programming suggestions related to market research for Board review</li> </ul>
<b>Third Quarter</b>
<ul style="list-style-type: none"> <li>• Plan farmer needs analysis with OSU field representatives</li> <li>• Begin outreach to farmers – visit and interview farmers statewide (anticipate this will be a three month process)</li> </ul>
<b>Fourth Quarter</b>
<ul style="list-style-type: none"> <li>• Complete outreach to farmers</li> <li>• Develop responsive programming suggestions related to farmer research for Board review</li> <li>• Award matching grants to individual markets for EBT equipment or permanent signage</li> <li>• Hold strategic planning and visioning workshop for OFMA Board of Directors</li> <li>• Adopt three-year strategic plan</li> </ul>
<b>Fifth Quarter</b>
<ul style="list-style-type: none"> <li>• Develop funding plan to accompany three-year strategic plan</li> <li>• Establish programs outlined in strategic plan</li> </ul>
<b>Sixth Quarter</b>
<ul style="list-style-type: none"> <li>• Hold regional forums to educate farmers and markets about services and programs offered by OFMA and reinforce regional networks and partnerships</li> <li>• Hire permanent director and transition from Oregon Rural Action project support</li> </ul>

**THE “10 CHARACTERISTICS/INGREDIENTS OF A SUSTAINABLE ORGANIZATION”**

1. *A compelling vision, focused mission and a strategic plan that involves many and gets used*
2. *Effective and focused programs*
3. *Diverse fundraising efforts*
4. *Clear and accurate financial management*
5. *An effective governing body*
6. *Intentional volunteer leadership and staff development*
7. *Community networking and visibility*
8. *Appropriate technology that supports the organization's work*
9. *Clear communication within a “learning environment”*
10. *Ability to celebrate success and enjoy the work*

**(From the Institute for Conservation Leadership)**