Guide for trainers of the Solid Base training programme

Solid Base - Financial Sustainability Education for Solidarity-Based Food Systems’

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INTRODUCTION

The project “Solid Base - Financial Sustainability Education for Solidarity-Based Food Systems” was formed by five partners to design a European core training programme and support educational tools. The partners are Tudatos Vásárlók Egyesülete, (coordinator, Hungary), Asociace místních potravinových iniciativ (Czech Republic), Netzwerk Solidarische Landwirtschaft (Germany), the international network, Urgenci (based in France) and Forschungsgesellschaft die Agronauten e.V. (Germany). The training programme aims to support the long-term financial sustainability of solidarity-based food systems, especially in the case of community supported agriculture.

Solidarity -based food systems (SFS) are in a rapid growth in most European countries. However, Solid base partners identified that these small-scale farm-based businesses are facing challenging situations — even if they do enjoy strong financial support from their local communities. In order to understand the situation and better map the educational needs, the project started with a European research which proved to be an essential resource in the training planning process. Based on the main finding partners designed a modular training programme and tested in three partner countries (Hungary, Czechia and Germany).

The four modules of the Solid Base training programme are:

- Training module 1: Management
- Training module 2: Financial planning
- Training module 3: Digital tools
- Training module 4: Participatory inclusion techniques

This guide summarises the training package, gives relevant background information about the different dimensions of financial sustainability of SFS’s, and identifies best practices and provides analytical guidance as a base for Solid base modular trainings. In designing non-formal and innovative training methodology and testing these with consumers and farmers, partners formed the training to the needs of the learners to ensure peer to peer learning. But as the needs and circumstances are not the same, the methodology also allows flexibility. Choose and test what you need! We would be happy if you send us your feedbacks!

More information on Solid base and other tools available here: https://urgenci.net/solid-base/ and on Urgenci's hub: https://hub.urgenci.net/.

SOLID BASE RESEARCH

INTRODUCTION

Solidarity-based Food Systems (SFS), notably Community Supported Agriculture (CSA), are manifestations of solidarity economy which provide education and usually practice an agroecological approach to farming. Despite the noticeable benefits that these solidarity economies bring to communities, poor planning or management can result in stressful situations such as: the overworking of farmers, financial strains, and even the collapse of initiatives. The project SOLID BASE (2017-2019) aims to scrutinise this topic in order to provide viable SFS/CSA's with *"skills that could contribute to a real chance for breaking out from the continuous financial instability they are facing, and from the 'living on the edge' experience only nuances away from poverty"* (application Solid Base 2017). The problem of financial sustainability and phenomena such as overworking are of course not limited to SFS/ CSA initiatives only — they are common features affecting contemporary agriculture. However, SFS/CSA intend to become an alternative economic model whose main purpose is to generate less pressure for the farmer and the environment. In this report, as in the project, we address several forms of SFS in Europe, but mainly focus on CSA initiatives.

Currently, there is a research gap concerning the financial sustainability and management of CSA initiatives worldwide. It is not a coincidence that research and training were two of the most demanded elements which were deliberated in 2016 at the third European CSA Meeting in Ostrava. That is why this guide was written: to address this issue and advance SFS/CSA initiatives by generating knowledge and providing support. This report aims to give trainers relevant background information about the different dimensions of financial sustainability and also identify best practices to provide a foundation for the Solid Base training module. It will be a resource for trainers, staff members and experts, offering clear guidelines to help learners launch financially sustainable initiatives.

However, it must be clearly stated that this guide is unable to answer all questions in detail. Indeed, the topic of financial sustainability has many aspects - from bookkeeping tools to organisational communication and crop planning. Furthermore, the situation in Europe for CSA initiatives is diverse. This is true as far as legal requirements are concerned, but it should also be stressed that CSA's are operating in heterogeneous socio-economic circumstances.

To address the topic of financial sustainability in a way that considers the stakeholders' needs, the development of a communal questionnaire was organized. This included active contributions from farmers, consumers and CSA group coordinators. Research included a literature review, a detailed online questionnaire addressing CSA's all across Europe (with 116 respondents) and additional qualitative interviews with CSA (or SFS) farmers/consumers across Europe. Furthermore, a separate online survey (with 387 participants) was conducted to gain insights from the consumer perspective. The European CSA research group, composed of representatives from most European countries, was part of all the research.

DEFINITION OF SFS AND THE STATE OF RESEARCH

Definitions

The definition of Solidarity-based Food System (SFS) (SOLID BASE 2017):

SFS's are forms of short food supply chains which are based on solidarity economy (SE). Solidarity-based economic units rest upon a model of democratic decision-making and a participatory management system, which aims at ensuring collective responsibility for the outcomes. SFS's often produce organically, or at least in a climate-friendly way. They provide nutritious food with less ecological impact and higher social benefits.

The definition of Community Supported Agriculture (CSA) (European CSA Research Group 2015): "CSA is a direct partnership between a group of consumers and producer(s) whereby the risks, responsibilities and rewards of farming activities are shared through long-term agreements. Generally operating on a small and local scale, CSA aims at providing quality food produced in an agroecological way."

SFS and CSA

"Solidarity based food systems" was chosen as the umbrella term to take into account various forms of organization. It is distinct from CSA but nonetheless shares a similar approach to sustainability, fairness and solidarity. This refers to: buyer groups, food coops and enterprises that foster direct farmer-consumer relations; social cooperatives; and others. The food assemblies are not considered an SFS model, as they are largely seen as

business-driven approaches that have aroused controversy with the role they play as intermediary.

The definition of financial sustainability (Solid Base project 2018):

The financial sustainability of CSA's refers to *"the ability of the farmer (or farmers) and the CSA community to maintain both the farm(s) and the CSA initiative in the long-term. In order to achieve this long-term resilience, the farm should not depend on specific external grants or donations, and should not transfer debts either to the next generation of farmers, or to the community"*.

METHODOLOGY AND MAIN TRENDS EMERGING FROM THE SURVEYS AND THE IN-DEPTH INTERVIEWS

In order to generate an overview of the main issues regarding the financial sustainability of CSA and SFS, the Solid Base research group chose to collect two main types of data: a comprehensive questionnaire (with more than 50 questions), and in-depth interviews with CSA farmers and consumers.

The questionnaire was drafted comprehensively, with a focus on covering many topics. Its objective was to collect data from different contexts across Europe in order to determine repeating patterns and identify more study cases. The response of the CSA movement to the overall questionnaire was satisfactory, with 116 *filled* questionnaires. The goal was never to accomplish perfect representation, as that would have been too challenging.

Most of the lessons shared in this document are based on a combination of online questionnaire results and qualitative interview outcomes. 37 in-depth interviews were conducted in total (11 with German, 9 with French, 7 with Swedish, 5 with Czech, 1 with Irish, Greek, Belgian, Norwegian and English interviewees), all using the same 20-question-grid, with a mix of farm budget, marketing and community-building questions. A questionnaire for consumers was also sent out and answered by 387 people.

2.1. Main trends regarding financial sustainability emerging from the online questionnaire

Let's start with the final question from the questionnaire: *"How do you feel about the future of your CSA?"*(question #90). Even if highly subjective, this question sets the tone of the questionnaire. Only two of the respondents declare themselves pessimistic, whereas 25 are "undecided" and 90 are optimistic. To the question #49: *"have you seen a financial improvement in your CSA farm(s) for the last 5 years?"*, only 13% answer no, and a comfortable majority (59%) yes. In our sample, most respondents are overall very positive about their experience of CSA.

Among the main reasons to rejoice, the CSA model certainly offers financial guarantees to the farmers, which was also unanimously mentioned in the interviews. The prepayment is always ranked as the number 1 strength of the CSA, as "it provides the farmer with a cash flow that cannot be found in any other farming sector!" (interview with Denis, France). Question #27 was "How does the CSA partnership affect each of the following operations?", and the respondents had to choose for each operation -2 (very negative influence); -1 (negative influence); 0 (neutral); +1 (positive influence); +2 (very positive influence). The most positive answers are about the "financial ability to meet annual costs", for which 61 out of 79 answers describe a positive or very positive influence, and only 3 a negative or very negative influence. Then comes the impact of CSA on "farmer compensation", with 52 answers of 79 reporting a positive or very positive influence, and only 4 a negative influence. The farmer's financial security is also positively affected by the CSA model for a majority of the respondents, even if, for this particular question, there is a significant proportion of respondents who consider the impact "neutral".

This positiveness should however be somewhat tempered by the result from another question (#48): "overall, is/are your farm(s) as sustainable as you'd like it to be?" 43% of the answers were no and only 42% were yes.

Some features are clearly shared across countries. For example, the length of the minimum commitment is longer than expected (question #37). For 51 of the 116 respondents, the minimum length is one year, which is often identified as the longest possible commitment for consumers. For a clear majority of respondents (75/116) it is 6 months and more. 16% only report a commitment that would be less than 3 months, and 5% even no commitment at all. In fact, the latter respondents don't even actually claim to be CSA, but SFS. In Finland, for example, the REKO system does not ask for any period of commitment, just for the prepayment of the next order.

Another common feature is the type of distribution. Door delivery service is only mentioned to the level of 15%. This data is important, as this particular characteristic would work better with a box scheme than a CSA. There are some cases of self-harvest, but the huge majority of initiatives in our sample are based either on distribution on a common spot, or on pick up at the farm.

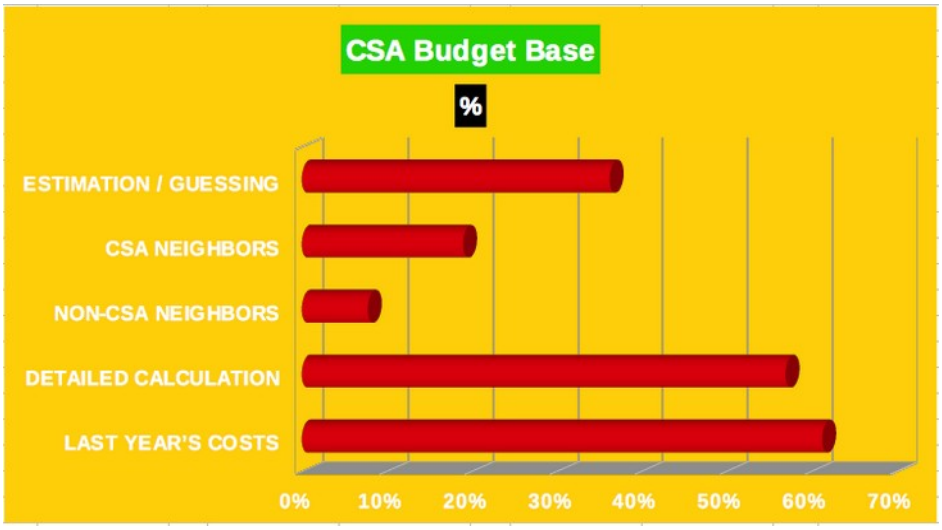
Regarding the question, "Who are the workers on the CSA farm? What percentage of the total workload in terms of time do they contribute?" we get the following result: time contributed by CSA members on the farm is quite small. Most work is done by the farmer, at times supported by seasonal paid workers. Interns, volunteers, and unpaid family members do play a role, but only a rather small one.

Further, the questionnaire also reveals a common approach on an overarching issue: the increasing competition within the landscape of local food systems. Even if a large majority confirms that the local food availability has been increasing during the last 10 years (84 answers out of 116, question #65), only a small part tends to think that this affects their financial income (#66: 10/84). This issue should be contextualised, especially considering what farmers have stated in the interviews: *"our consumers can't be fooled. The new box schemes, food assemblies, and the like, are so different"*. Some of the interviewees also stressed the importance of keeping this distinction, because *"making yourself different will increase your appeal and bring more support from the community"*. There seems to be an ongoing debate between making CSA more flexible and more convenient in order to attract more people, versus sticking to the founding principles and staying clear of all the new short supply chain models.

For problems with financial sustainability (question #51), the three most consistent answers were capital investment, member recruitment, and operating costs. Additionally, labour and machine costs were the most underestimated costs by far. Budgeting seems to be a skill that many respondents report needing help with.

The budget base (question #58) is mostly based on previous experiences and on detailed calculations (multiple answers possible). Surprisingly, estimation/guessing is the third most popular answer, more common than comparing to their neighbors.

On the price side, 24% didn't update the share price in the last three years (not even for inflation), but 85% of members reacted to a price increase favorably (from the CSA's that reported their response to a price increase).



The respondents most favored the following ways to address the issue of financial sustainability through personal and collective learning: farmer exchanges, on-site visits by technical advisers, and hands-on trainings.

2.2. Main trends from the qualitative interviews with farmers

The qualitative interviews were held in person or by phone with farmers (farmers/coordinators). When looking at the main results, the following aspects were striking:

Emergence: Nearly 40% of the CSA's interviewed have less than 2 years of existence, only the French AMAP's operate much longer on average (9 years);

Production Focus: An overwhelmingly high number of CSA's focus their production on vegetables, followed by herbs, meat, eggs, fruits and honey. Only a few number of these associations produce dairy products, flowers or bread;

Financial Situation: The majority of the CSA's interviewed in the study suggest that they have experienced some sort of financial improvement over the last years. These improvements and the self-perception of financial stability are mainly due to:

- Continuous adjustment of share prices;
- Pre-payment scheme allows for security, risk amelioration and liquidity;
- Nevertheless, some CSA's struggle with initial investments.

Work-Compensation Relationship: A significant trend was observed that interviewees suggest that the compensation is enough to have a "full life", where their needs could be met. Despite this trend, concerns exist regarding the "hard work/effort" that these activities entail in relation to the income received. There are some contrasting positions.

Leave Days: An increase of holidays thanks to the CSA model is reported in the interviews.

Side-Jobs and Incomes: The vast majority of the farmers that were interviewed need side-revenues for their activities. CSA's usually represent between 50 and 70% of total income.

Work Organization: Several CSA's heavily depend on volunteers/membership work to sustain. There is a trend towards a low number of permanent workers (full-time) complemented by greater numbers of volunteers and paid seasonal workers.

Use of digital technology: Within almost all SFS's there are standard office programs in use. Spreadsheets are helpful in various parts of organization: Member administration, crop planning, budget planning and bookkeeping. Interesting tools that were mentioned were: Garden planners: Tend, PC-Gärtner; Bookkeeping: "Visma Specs"; Selling: OpenFoodNetwork

Improvements: A significant number of CSA's mentioned "infrastructure" and "investments" as being areas for further improvements (i.e. irrigation systems, storage capacities, machinery). "Work-related issues" were less significant but observable (i.e. knowledge and expertise).

Share Prices: Usually CSA's start by comparing (benchmarking) prices with other similar organizations. Some mentioned that they base their prices on the market.

Ideal Membership Calculation: A large variation regarding the ideal amount of members has been observed. Factors that might explain this discrepancy depend on production capacities, location (urban v/s rural) and consolidation (years of experience).

No Competition: the vast majority (over 90%) of CSA interviewees suggest that no local competition exists between associations.

2.3. Main trends from the consumer interviews

387 consumers took part in the survey and filled all the questions. Surprisingly, like in the "big" questionnaire, the percentage of answers from Czech Republic is high, in this case almost 50%. Therefore, we analyze the data both with and without Czech consumers. The main outcomes are the following:

- When asked about the financial contribution to the CSA, the majority of consumers (~80%) think that the share price is ok for them - this could indicate that farmers shouldn't be shy to give the most accurate costs!

- Regarding the benefits of being part of a CSA, once again, price considerations are lower in importance than environmental concerns (~85%), freshness and seasonality (~85%), quality (~81%) and traceability (~78%). Multiple answers were possible.

- Quality emerges as the main motivation for the choices in general, followed by the environmental impact.

- The feeling of connection with the farmers and the fellow CSA members is there, but rather moderate. It does not seem to be the main reason for staying in the CSA. However, more connection between the farmer and the members would serve to help or maintain the retention of members, and more connection between the members helps even more. By building up the community among members and with the members, they could maintain a stronger core group.

- Regarding members' involvement in the CSA, it is mostly focused on coordination. A majority of CSA members are happy to let the farmers handle the financial aspects. However, members would like to be involved in the crop or product planning. Farmers could consider allowing more opportunity for CSA members to weigh in on which products they'd like to see.

- The CSA consumers are mainly urban (~62%), in their thirties (~37%) and well-educated (~60% master or PhD. degree). There are clearly more females (~69%) than males (~27%). The over-representation of the Czech CSA movement might have impacted this trend, though.

OBSTACLES, CHALLENGES AND SOLUTIONS FOR THE FINANCIAL SUSTAINABILITY OF CSA

In this third chapter we are looking at what are the main obstacles and challenges for SFS's towards financial sustainability.

3.1 Economic knowledge

How to plan the budget? How to draw a business plan?

Budget planning is one of the crucial points of financial sustainability, and one that poses an issue for many initiatives. When asked question #88 "What skills/knowledge related to financial issues are missing from your CSA?" the most commonly chosen reply was Budget Development (30% of all respondents).

The UK CSA network provides documents to address the issue. In the finance section, the basics are communicated, e.g. the difference between budgeting vs. cash flow. For starters, a CSA budget is outlined.

In Germany, the SoLawi network (Solidarische Landwirtschaft, Solidarity-based Agriculture) has established a similar package of information[1] (in German) - the MakeCSA project[2].

Anschütz has developed an elaborate tool for business planning in a CSA context that tries to enable a user-friendly way of analysing what to expect and what to consider. The work is limited to vegetable production, however, and is only available in German. The excel table (and the guidelines on how to use it, see portfolio) tries to give a realistic understanding of the costs of the operations. This is done with the assessment of key figures that can be expected (labour costs, space needed per share, taxes, share price etc)[3].

Another result from the questionnaire related to price building comes from question #58. The respondents state that they usually don't take into account the prices practiced by non-CSA neighbours, but that they base their budget on the previous year's costs and the detailed calculation of their own farm project. This means that these guidelines and examples from CSA networks are actually very important for newcomers. In many interviews it was stated that the ideas at the beginning had to undergo a reality check. The beginning is always when the enterprise is the most vulnerable.

To ensure a realistic budget, an external professional advisor or book-keeper can be hired; other CSA's do it with skilled volunteers. The German SoLawi Lebensgarten attributes much of their financial sustainability to the bookkeeping skills of one of their members, who does this voluntarily. But what can be done if there is no finance expert or accountant in the CSA? In some cases, e.g. certain questions related to VAT/taxes and the aid of CSA, volunteers might not be sufficient because these are special questions that sometimes have no clear legal precedent (CSA community/association buying land e.g.). Here, the help from experienced CSA farms and advice systems set in place by national CSA networks might be useful.

The "Kartoffelkombinat" from Munich, Germany has a strong emphasis on the financial sustainability of their cooperative since their start in 2012. They have an 18 ha production site, of which 7 ha belongs to the cooperative since 2017 and 11 ha are leased. On this land, 66% of the food shares are produced for 1300 households, the remaining 33% are allocated from mainly 2 other farms. From 2020 onwards, about 1.650 households will be supplied, with 80% from its own production, which is seen as optimal size. At the moment about 30 people work there. In the estimation of the cooperative's members it is important to point

1 https://www.solidarische-landwirtschaft.org/fileadmin/media/solidarische-landwirtschaft.org/pdf/Medien/Netzwerk-Solawi-Mustermappe.pdf

2 http://www.agronauten.net/solid-base/

3 The tool for economic planning (in German) can be found here: https://www.solidarische-landwirtschaft.org/mediathek/medien-fuer-den-aufbau-einer-solawi/

out that they believe that the urban clientele is not totally suitable for a kind of concept that involves them heavily in farming and distribution tasks. They estimate that these people have little time to help, but still have the aspiration that the supply works fluently and that the Kartoffelkombinat lives up to the concept of local, organic food that is produced in a fair way (added value). An increase of the share prices, with an extra solidarity payment for the purchase of the enterprise (7€ extra/month) was discussed. The reasons were explained in the general assembly and the price increase was accepted by the members. The cooperative form forces this solidarity-based approach to be transparent, enabling thought and reflection upon economic sustainability. This is also due to the fact that members of the cooperative are also often recipients of the food shares. Therefore, communication with the members of the cooperative is a high priority — including an evaluation concerning the level of satisfaction among the members. A special membership management software was developed with user-friendly interactive solutions.

The financial sustainability of the CSA should be ensured through long-term planning and continuous monitoring and reflection. It is therefore a good idea to have a medium/long-term business plan. The UK CSA network gives an overview of what should be kept in mind, both in general and in regards to the business plan.

What should I cultivate? How should I organize my production?

There are many different factors affecting the choice for the type of production. One of the findings emerging from the questionnaire is the over-representation of "herb" production among the answers. It is the second most represented production type (94 answers, out of n=245), after "vegetables" (158), and long before fruits (77), dairy, meat or cereals. It is in line with a recurrent observation in the farmers interviews as, in many cases, the CSA vegetable growers who did not initially plan to grow herbs eventually realized it was an interesting addition to their income. Herbs don't require a lot of land and they are usually quite advantageous from a financial point of view. Herbs and wild plants are also well valued by the CSA members, as an addition to the veggie share. They are thus quite interesting for small farms.

There are two standard books that can help making the right choices, both from Quebec, Canada. Both deal with the economics of farming, especially crop planning. Both authors are involved, to different degrees, with CSA. Frederic Theriault wrote the book *Crop Planning for Organic Vegetable Growers*, which gives a field-tested eleven-step planning approach that helps farmers move towards financial sustainability. In steps 1 and 2, Theriault explains how to set realistic financial goals and figure out how to meet them through marketing outlets. In steps 3 to 8, he explains how to develop a crop plan. In step 9, the reader learns how to implement the crop plan and to record what actually happens on the

field. In steps 10 and 11, a frame is given to analyze how the crop plan fared and the planning for next year can start.

The other author, Jean-Martin Fortier, who wrote the book *The Market Gardener* (2012), intended to provide a guide for successful small-scale organic vegetable production. In this book the financial feasibility of bio-intensive and human-sized production is meticulously outlined.

The German CSA GartenCoop have made their crop planning public (in German[4]) in order to provide inspiration for other CSA's. It is part of the open source approach that has become an important element for many CSA's.

Is there a "perfect location" for becoming a financially sustainable CSA operation?

Location is important. The territory where the farm is operating should be analysed thoroughly. If you are still deciding and still have a variety of options, don't make your choice based on the beauty of landscapes, but rather according to the selling possibilities offered by the location. One striking observation in the corpus of interviews is the sharp division of the financial situations of farms in peri-urban settings, within selling distance of a major city, on one end, and the farms in a rural setting, with no big city in the nearby on the other end. This is not to say that CSA farms would have no future in the countryside, but rather that they usually face a less extended reserve of committed consumers. For example, the stories heard about members "pushing" the farmers to raise their salaries are true, but they have been heard almost exclusively in the CSA groups that are closer to big cities.

I just realized I screwed up with the budget, what can I do?

A widely observed mistake can be summed up as follows: *"I built the wrong budget at the beginning. I underestimated some of the costs…"* The questionnaire gives a clear idea of 3 main under-budgeted costs: labour costs (cost of production on the farm), savings for investment and machinery/equipment (questions #54 and #55). In the PhD research written on small scale farms doing CSA in the Walloon region in Belgium, the most negative factor leading to the preparation of a wrong budget was the farmer's preference not to share their financial problems, even with fellow farmers or with consumers.

The build-up of capital and long-term planning are an issue: one third of the CSA's in the survey stated that they were insufficient in obtaining necessary funds for needed investments in the last 24 months (question # 67).

How to relate the price to the production?

4 https://www.gartencoop.org/tunsel/node/3808

During an internal study conducted by the CSA network in Provence, France, one of the findings was that all successful vegetable growers are working with a ratio of shares per full time worker which ranges from 22 to 100. It has become a convention among the AMAP vegetable growers in France to consider that 40-50 shares is the maximum one full time staff can produce, and that beyond this amount, another full time worker would be needed.

I'm trained to grow vegetables, not to write budgets…

Generally speaking, among farmers there is a recognized lack of training on budget. CSA farmers are no exception. CSA and other types of SFS have the tremendous advantage of offering the farmers access to a pool of volunteers with complementary professional skills. During the in-depth interviews, numerous farmers stated that they rely on a member from the core group, who was able to present the budget to the rest of the members.

As Erwann, an AMAP farmer in France, says, *« preparing a budget is one thing, interpreting and presenting a budget to a group is a completely different thing »*. As many farmers have explained in the interviews, it can prove decisive to ask somebody with experience in accounting to help out in the process. Some farms even dedicate some staff time exclusively for this purpose, while others prefer to work with accounting professionals who help on a voluntary basis. One should check what skills could be provided by the group and should not hesitate to make use of them.

"From the day somebody from the group took over the budget planning and presentation part, my CSA members started to understand how much it would take to increase my salary as « their » farmer, and they made such a proposal from their own initiative. Making people understand your budget is key to show the coherence of what you are doing."

Among the difficulties to make a budget understood, one important aspect is to show on an extended span of time, how it is evolving and what the development of the farm is.

I'm afraid of losing members because I'm setting prices that are too high

This fear of losing members due to high prices has been widely observed in the scientific literature on the topic. It is also observed in the questionnaire, where comments to question #53 ("In hindsight, how satisfied are you with your calculation of the share price at the first ever season of your CSA project?") report such an experience:

"The weekly price is too low for the quality of food and this is part of the reason for our financial problems, which are relatively minor. We solve our financial problems by applying for grants and we have ad hoc fundraising events in the community which also act as 'marketing opportunities' for Farm Membership."

"The share price rose continuously. This led to conflict and several members quitting. In hindsight our farmer admitted that he had calculated the price to low."

"it was way too low, but as CSA was new at that time in Flanders, we thought people would not join the CSA."

"In the first season we did not have a good model for compensation to the farmer, this was in place in the third season. In all other aspects the share price was well calculated."

This competition felt by the CSA farmers often results in prices that cannot cover all the costs. However, one of the findings from the questionnaire is that **a majority of the respondents report an experience of price rising** (question #57), and that among them, a large majority states that ***"members accepted and understood"***(55/75). 10 out of 75 explain that *"members wanted the price to be risen"*, and only 2 out of 75 report that "members contested and many left", and 4 that, *"members contested but stayed"*. Of course, one should be careful about not generalizing to all existing CSA. The respondents are probably among the most convinced and most ardent CSA groups. Yet, the questionnaire shows that **price-raising is a widespread experience, and that it can be handled in a successful way**, if communication is conducted in a transparent way. Laurent, a farmer from Paris area, recalls the experience he had of price-raising, from consumers' initiative:

"Historically, when we started in 2006, we were among the first AMAP's (CSA) in the region. There was no tool to calculate the share's price according to the expenses. We didn't have enough experience. So, we started a bit randomly with a 15 euro share. The first 2 years were quite good in terms of production. Then during the General Assembly to start the 3rd year, the question asked by core group members was "how much should our farmer be paid?". They decided to go for a 2,000 euro monthly net salary. That was really more than I would think, clearly above the minimum wage I could dream of... "

I'd like to try the bidding of the German CSA model. How should I do?

Bidding rounds are a widespread part of the SoLawi concept. They give an opportunity for the whole community to get together, to conduct transparent discussions about the costs of the SoLawi endeavor, all while also offering space for negotiations about the individual monetary value of the share.

After some years of experimentation, SoLawi Mannheim-Ludwigshafen (MaLu) is now using a procedure that works well.

1st phase: 4 months before the beginning of the SoLawi year, an email is sent to the members. **Members are asked whether they want to continue their membership**, and, if not, they are asked to cancel their membership within the 3-month cancellation period. This

gives a first hint on the number of members for next year's calculations. It is mandatory to answer these emails. If someone doesn't answer, there is usually an attempt to establish contact by phone. If there is still no answer, this person cannot be included in the bidding round.

2nd phase: A more detailed flyer is sent to all new and remaining members at the beginning of the month preceding the bidding round.

Each bidding round is one week long and takes place online using emails and phone. No average prices (of the shares) are communicated, only the total costs of production and how much is still needed. The bids are placed using yearly amounts and avoiding discussion with monthly values.

A maximum of 5 rounds is planned, but until the present day this has not been needed. After a round has been successfully conducted, the general assembly is held. This strategy led to a good acceptance of the farmers' needs and also to individual monetary contributions according to each member's abilities.

Our group would like to set prices that would be fairer for the farmer but also for CSA members: how should we do so?

Les *Jardins de Cocagne* is one of the first CSA's in Switzerland, founded in 1978 in Geneva. It is organised as a cooperative. Their price-scaling scheme has been set up so members get a share per week, 11 months per year. Principle: each contribution is proportionate to the average gross annual incomes of the adults. The 2012 General Assembly decided that the vegetable share should increase automatically each year by Fr. 15.- for average shares and by Fr. 10.- for small shares. This increase is already accounted for in this scale.

If there is no answer from the new member, he/she will be considered to be class 9. The class level can be changed if you have children or dependants: minus ½ point per child or dependant (½ point is not enough to change class). See below the table.

How can I do CSA without working too much?

During the last two decades, numerous social studies have witnessed an increase in the appeal for regular holidays among the farming population[5]. The ability to take a break from work is also becoming an essential part of the concept of sustainability. Overworking is, of course, unsustainable. CSA farmers are no exception in this global social trend, yet the path towards fulfilling the growing desire for more holidays is not easy. Let's have a look at the questionnaire: in the question about the positive or negative influence of CSA, the influence

5 Bertrand Hervieu & François Purseigle, *Sociologie des mondes agricoles,* Paris: Armand Colin, 2013, pp. 184-185.

of the CSA model on the farmer's workload scored the highest rate of *"negative influence"* answers. There seems to be an acknowledgement, even among the most convinced CSA actors, that the farmers may tend to work even more in the CSA's. As one of the French interviewees put it, *"l'AMAP est un métier en plus"*, *"CSA is another business on the top of farming"*.

Most of the solutions found to this problem are related to planning ahead. In Happy Onion Farm in Malmö, Sweden, the decision was taken to set the number of working days, working hours, and wage as part of the budget. In this initiative, the farmers charge much more than other CSA's, but they know there are people that can and will pay. Capping the hours and setting a living wage from the beginning prevents burnout.

Another solution is to work in association with another farmer. Even if the type of production is not exactly the same, with basic training, associated farmers can easily help each other.

As a joint initiative of farmers and consumers, ortoloco follows a simple principle: the cooperative ortoloco leases 1.4 hectares of arable land from the Limmattaler organic farm "Im Fondli" and cultivates over 60 types of vegetables, under the guidance of permanent gardeners. The vegetables are harvested, distributed and consumed weekly by the participants. The members make the important decisions together at the cooperative meetings. By working in the company, consumers fulfill their responsibility. This creates a lively relationship with the products.

Working on the farm is compulsory or all members. By doing so, work comparable to 5 full time employees is done by the members, who each invest 5 half days a year. Some effort is put into making the working days as nice and enjoyable as possible. Often, music is played on the fields. The work assignments are organized by a specifically programmed tool called "juntagrico" that has further functionality for the management of personal data, delivery points and shares of the agricultural cooperative ortoloco.

How can I anticipate risks and unexpected events?

In the pure CSA model, the risks and benefits of the farming activity are shared. This implies that, if a farm is facing a major issue, the shares could well be empty for several weeks. In practice, however, this rarely happens. For example, Lucile, a goat cheese maker from France says: *"I don't feel authorized to play fully the game of AMAP. Theoretically, there should be a share of responsibilities; this should be the starting point. I chose not to go to the farmer's market during last winter, even though I was facing major difficulties, because I wanted to fulfill my commitment to the AMAP-ians. Last winter, I produced 10 liters of milk a day, instead of 30… With 30, I usually have enough for the AMAP and some more cheese to*

sell on the markets. Should I have kept going to the market and stopped providing CSA shares? I chose not to play the AMAP game fully… I couldn't imagine myself telling the AMAP members: "well, dudes, you paid three months, and you won't get anything at all". Yet, normally, as the AMAP's were initially designed, it should be like that. Personally, with the disease in my goat cattle, I had to cover the costs of the veterinary, the loss of animals… Actually, one of the groups spontaneously raised some solidarity funding for me, but I didn't dare to ask the others".

Another couple of farmers from France reported the creation of an emergency fund from the beginning, where a small amount of money (around 1% of the budget) was treasured every year. This fund proved very useful, as their first child actually turned out to be twins…

Another good example of a risk anticipating scheme is with *Les Jardins de Cocagne*. There are three complimentary systems securing investments and some funds.

The first mean for cooperative stock is through **social shares**. In order to have some room for maneuverability, each new member has to buy a social share. Each member should ideally buy at least 4 more shares in the following years to own at least 5. During the 1993 General Assembly, the members decided that the value of the social shares would lose CH 5.- per year (until a limit of CH 25.-) as residual loss, but it would still remain reimbursable on demand if a member resigns from the cooperative. However, as the cooperative reports, members quitting the project for one reason or another would often not ask for the reimbursement of their share.

The second means for securing funds is through **loans by the members**. CH 60,000.- have been collected this way. These medium or long-term loans would be of a minimum of Fr 500.- per person, and there would be no interest.

The third mean was **a deal with the Alternative Bank that covered the overdraft** in order for them to finish the year.

3.2. Social education and community development to achieve financial sustainability

Overcoming the tension between moral and market economy

As the work of Humphrey in the UK and Galt in the US have shown, there is a tension between the aspirations for solidarity on the one hand and the price and convenience for the consumer on the other hand. The success of the CSA depends on the ability of the initiative to address this properly in its initial design. This means each CSA should either find

ways to involve the community properly or find ways to run the CSA without the reliance on the active participation of the members.

How can I motivate the members to help?

The SoLawi Dalborn in Germany plans community events during peak-time for help on the field in order to make member participation more fun and to get more people for this important work (e.g. weeding in spring). Furthermore, they have started an action cafe for 3 hours on the farm, parallel to the pick-up times, that includes coffee and cake as well as a little seed-bazar. Along with having a chat and getting to know the farm better, they are encouraged to help a bit as well. Another event is an "end of workday weeding" session that gives some relaxation through farm-work.

How can I educate the consumers to the cost of farming?

One of the best ways to educate consumers is to get them engaged in the farm activities. *Kristiansand Andelslandbruk* in Norway is an example of a community-run farm that encourages everyone to take action. Even if members cannot help with the farming activities, they can help with other aspects of the farm's operations (packing, delivery, communications… etc.).

Too often, the farmer's self-confidence is too low to accurately articulate their needs and to inform consumers, however, **a group coordinator can help a farmer through many delicate processes, including increasing the price of the share.** For example, in the Czech initiative CooLAND, at the end of a previous season, the CSA coordinator asked the farmer whether his share price covered all the costs, as the price had been at the same level for several years. In their discussion, the farmer admitted that he wanted to raise the price to cover the rising costs of transport, but he did not know how to tell the shareholders. The coordinator organized a meeting between members and the farmer, but the attendance was too low. The coordinator therefore prepared a questionnaire describing the situation. 95% of the members who participated on voting agreed to the proposed price change, or even suggested a higher price. The next season, the price was increased by about 20%, which helped the farmer cover costs, not only transport, but also for better salary for his workers (CSA CooLAND).

The interviews reflect two trends within the movement that are sometimes difficult to combine. Part of the interviewees insist on the need to stress the real cost of farming. They tend to justify higher costs in the CSA despite the low costs of mainstream food distributors. This is mainly because conventional distributors are highly subsidized due to their lobbying capacity. In their perspective, it would be impossible to compare prices that are produced by

completely different mechanisms: the logic of the market on the one hand, the logic of fair pricing for the farmers, on the other hand.

This study was conducted to reply to the frequently heard assertion that *"organic food, including CSA food, is expensive and only yuppies can afford it"*. This study proves that the reality might be a bit different, even if the first function for the price in a CSA is not to be low or attractive, but to be fair.

How do I organize exchanges of products with other CSA farms?

In the Czech Republic, for example, CSA farmers share not only their own experience and knowledge, but they also help each other by exchanging crops or joining forces to purchase seeds and seedlings. This allows them to reduce entry costs and also offer more diversified vegetables for shareholders. *"For example if one farmer produces a lot of onions, he can change his surplus for another product that might be missing from his share. This works well at the regional level"* (Svobodný statek, Karel Tachecí, KomPot).

How can I organize self-harvesting on the farm?

Le Champ des Possibles, in Belgium, is a trust-based organic vegetable growing and self-picking project. The 130 members pay a yearly 275 euro lump sum for an adult and 13€ times the age of a child (for the same quantity). All the production is dedicated to the group members, so there are no other selling channels. The all members have free access to the field as there is a gate code. Each week, they come and collect their share whenever they want to. The field is always free to access for them.

On the spot, all the possible harvests are listed on a blackboard, and a system with flags allows the members to know what is to be picked up. All the necessary tools are available (knives, spade shovels, forks…). A yellow flag means *"please pick-up according to the blackboard"*, a red flag means *"please pick-up as much as you need"*. According to the farmer, there is no issue with damaged vegetables, wrong vegetables or even thieves!

How to make the relationship between farmers and the group even stronger?

Do you believe communication skills are key to being a successful CSA farmer or a successful CSA group? You are absolutely right. Actually, it might be even more important than you think. In the Southern part of France, where AMAP/CSA has been experimented with since 2001, a report written for the Provence AMAP network in 2014 identified factors for success and factors for failures of AMAP farms. The socioeconomic situation of 19 AMAP farms in the region was studied and 2 interesting schemes were subsequently created. One shows the factors for failure, the other the factors for success.

Amap farmer: factors of success	**Amap farmer: factors of failure**

Installation context Support from relatives; Professional advice; Support from installing organizations; training.	**Installation context** Lack of professional advising (by farmers or technicians); Remoteness from relatives, family; Lack of training, experience; The project is not realistic; Lack of clarity in the project.
Personal characteristics and qualities of the farmer Resilience; Ethics; Communication skills; Curiosity; Technical skills; Works a lot/ resilient.	**Farmer** Lower quality of life; Unfair income; Not transparent; Not open to discussion; Low ability to listen; Is not looking for advice.
Strategies to make the enterprise work Organisation; Funding; Marketing/ selling; Communication; Networking.	**CSA** Contracts are missing; Lack of transparency; Unknown way of calculating the prices; CSA members are not satisfied (quality); Bad communication between the farmer and the group.
	Elements that can't be controlled by the farmer Slaughtering houses are far away; Reduction of CAP payments; Unavailability of land

It is impressive to see how many of these factors actually **social factors** are. They relate to networking, mutual support mechanisms and communicating with the group. All successful farmers are well connected to institutions, farmers' organizations and networks.

A key issue is, of course, to overcome the contemporary disconnection between consumers and farming that can create a lot of problems. Reconnecting requires to get people to come to the farm more regularly. In order to do so, farm visits, for example, be organized.

How do I deal with a significant turnover among members?

Member recruitment and retention seem to be a challenge for part of the interviewed CSA. To question #39 of the questionnaire, *"Do you have issues finding enough members"*, 21% of the respondents respond with *"it is always an issue"*, 13% *"often"*, and 22% *"sometimes"*.

This means that more than half of the respondents are facing difficulties recruiting members. This might be confirmed by question #42, about turnover, meaning the number of members to be replaced for the new season. It is difficult to interpret the membership turnover rate alone: the interviews tend to show that **CSA groups close to bigger cities will experience a high turnover (up to 30%) without suffering from it, because the pool of committed consumers is deep enough to provide new members**. Still, 39 of the 104 responses report a turnover of 25% or more, which can, in some cases, result in substantial efforts necessary to recruit enough new members. The proportion of obviously endangered CSA's is quite marginal: 12 groups have been experiencing a turnover of 40% or more.

Another question on this topic was about the type of "recruiting strategies" used in the CSA (question #40). By far the most common answer, almost unanimously, was "word of mouth", meaning through direct, personal, face-to-face contact between members, or supporters, and conscious consumers. This #1 answer is a clear way to stress the need for interpersonal contacts. With this information, even if the first contact from an aspiring member is made via an email, there should be a direct contact, preferably at the distribution spot, to make "applicants" aware of the voluntary, solidarity-based dimension of the CSA model. Several other answers gathered a significant amount of positive answers, without reaching the popularity of the "word of mouth" option — online activities including, prominently, social media and websites, were chosen by about half of the respondents. An equivalent amount of respondents chose informative public meetings and information stands at fairs or markets. Another 40% chose "networks", e.g. local CSA networks or organizations.

In this case, the question was framed as "member recruiting strategies," however, on the field, CSA members are also deploying "member retention strategies", or facilitating strategies to keep the spirit of community alive.

Cooking comes up naturally as one of the activities linked to the CSA activities. The Spörgelhof is situated outside of Berlin; they used some of the vegetables produced in the CSA to run a public community kitchen (VoKü) at a community centre one day a week in Berlin. This enabled them to use excess vegetables, create a regular meeting point to connect the CSA with the city and the prosumers, but also to spread the word about the CSA and recruit members.

Another example of these activities comes from France: *« As a way to have fun together while doing something useful, we decided to buy some kitchen equipment together. Then, we started to organize cooking sessions, where we learn how to prepare preserves with products from the farm, but also how to cook finger foods, apéro, from the share »* (BP16) Cooking sessions (AMAP des prés neufs, Jocelyn)

3.3. Resources and logistics

Questions #50 and #51 about the *"most pressing problems regarding financial sustainability"* point out to the *"lack of capital for investment"* as the most pressing problem regarding the financial sustainability of the responding CSA farms. How can a CSA get access to the necessary investment funds, without endangering the long-term viability of the farm?

How can I access funding for my CSA farm?

A large amount of small-scale farms have been excluded from bank loans because they are supposedly too small, or too atypical, to succeed. For a lot of these starting farmers, being excluded from bank loans results in a *"double penalty"*, as the professional advising organizations will not consider the starting farm as a priority farm to support. The scheme below (from *Une autre finance pour une autre agriculture*, p. 114) sums up most of the financial challenges that occur during and after setting up a farm.

Before setting up the farm	After the setting up phase
Needs of personal contributions and / or guarantee for: Getting a loan with banks; Investing in fixed assets (buildings / equipment / tools / etc ...); Investing in operating expenses. Needs of cashflow to: Compensate the waiting period before getting a grant (from 3 to 6 months).	Needs of personal contributions and / or guarantee for: Getting a loan with banks; Investing in the pursuit of the operation (maintenance, hardware replacement, purchasing land...); Investing in the development of the activity (processing, marketing...). Needs of cashflow to: Cope with emergencies (thefts, weather-related problems ...); Required working capital funds.

The Incubator-Farms model, as practised in the French Reneta network, helps newcomers to start their farm business. The model supplies a new farm with a close connection to an already existing farm in terms of access to land and infrastructure, as well as mentorship with a local farmer. Additionally, access to the local market (or, alternatively, to the prosumer community as in CSA models) helps the new farmer test the business model and the general idea of farming. The model also provides a secure environment in which to design and start a working farm because the newcomer has a chance to slowly adapt to the

regional, ecological and social conditions, and they can use the local facilities, utilities and land. Incubator farms represent a fertile ground to motivate not only trained farmers and gardeners, but also new career jumpers to venture into independence, and can either work as a model to facilitate farm succession or as a training period, with the benefit of already producing and selling one's own products. Incubator-Farms can play a significant role in the process of establishing new CSA projects by pairing resources with (wo)manpower in terms of newcomers who are willing to farm but have a lack of capital and land. They can also pair farms with unused resources and the desire to diversify not only the farm, but also daily life with new ideas and new people.

CSA is part of solidarity economy, and there have been numerous examples of crowdfunding within the movement. For example, the French CSA network has been giving visibility to independent associations linked to CSA, called "Cagnottes solidaires." These associations give 0% interest loans for farmers, which are to be set in 3 steps: the first step consists in setting up a legal entity, different from the CSA, to collect contributions from the members. During the second step, members make their contributions to the fund, with a right of repossession. The third step consists in making the collected funds available to farmers in need, at an interest rate of 0%.

To successfully start a CSA, investments are crucial and necessary. Investigations have shown, that the larger the primary investments, the better the general impression of the running farm in the long run (Karl, Rote Beete, 2016). If there is little or no equity capital, which is quite common among new starting CSA initiatives, some banks offer the possibility to provide credit for community pledges. So, if you want to do investments of 10.000€ you need 10.000€ in pledges (e.g. 20 members that pledge for 500€). The initiative communicates the needs for this investment to its members and organises the creation of the contracts for the pledges of the members with the bank. If the initiative fails to repay the credit in the future, the members have to pay back their part of the credit. This credit is usually more expensive than asking for direct credit, or for initial cooperative shares from your members, but it is quite easy to organise. Ask your local cooperative ethical bank for this possibility, if you don't know any, ask your regional network for contacts.

The Luzernerhof CSA is a classic and diverse farm with 32 ha of vegetables, grains, cows, pigs, bees, apples and cheese production outside of Freiburg, Germany. They undertook a hugely successful crowdfunding campaign for the purchase of the land and buildings for their farm in a ground-breaking combination. The CSA cooperates with the Kulturland cooperative to "free" the land through community investment and with the Mietshäusersyndikat, to do the same with the real estate (the farmhouse). Because of the contrasting nature of real estate and agricultural land, two different but like-minded

organizations are involved. The campaign was set to "re-invent agriculture" — there were 2 movies produced, one short, one long[6], and several events organized in and around Freiburg to advertise to project, including articles which were published in the local newspapers. Finally, over 140 people invested almost 1 million Euro for land and housing. Through this, they became part of the ownership structure of the Luzernenhof. However, this ownership includes the condition that neither land nor farm building can ever be used for speculation. That is to say, they have been taken out of the market. Along with the campaign came publicity, as now all 200 shares have been taken.

How to cooperate with other farmers?

One obstacle with the potential to majorly hinder the financial sustainability of CSA could be the lack of solidarity between farmers. In some countries or regions, CSA farmers might perceive each other as competitors — and therefore might not even be able to consider sharing or joint ownership of tools, or sharing costs or logistics.

When we look closely at the situation at a grassroots level, we can actually witness plenty of stories of farms helping each other at the beginning, or in difficult phases. The story of the *"Lumière des Champs"* CSA and *"Ferme du Joran"*, in Switzerland, might sound familiar to many young CSA farmers.

Lumière des Champs CSA was established 10 years ago. It is a non-profit organization where members pay a CH 75.- (66€) annual membership fee, plus a fee for the 48 times (weeks) the share is delivered. The fee is 48 x CH 21.- (18€) for a small share or 48 x CH 30.50 (26€) for a larger share. They work with 13 organic producers, the main one being the vegetable grower. There are two part-time employees: a coordinator and a person in charge of the delivery of the shares to the pick-up points. Since the beginning, the annual fees had been put towards a solidarity fund with which the CSA farmers and the core group were looking to support another project.

The « Ferme du Joran » is a new collective farm, with about nine farmers on 8.9 ha. They produce vegetables for a CSA, some soybeans for tofu making in another CSA, some corn for polenta and some ancient grains. This farm was badly hit by a storm, and most of their six greenhouses were destroyed.

The Lumière des Champs steering committee decided to support "Ferme du Joran" by giving them CH 1 000.- with no return donation.

Tamar Grow Local is an initiative for fostering local produce based in the Tamar Valley in south-west England. Due to its mild local climate which enabled early and abundant harvests, this region has a rich tradition of a market garden economy dating back to the 16th

6 https://youtu.be/_14vjzf83lc

century. But during the phase of industrialization and globalization this local food economy underwent a rapid decline. In 2007 Tamar Grow Local was founded to counter this trend by making ecological, small-scale farming economically sustainable once again. With this clear mission, the organization has developed a series of interrelated projects that provide marketing and distribution, cooperative development, shared infrastructure, and land access for agricultural producers throughout the valley.

The Luzernerhof CSA has cheese production as part of their production: It creates added-value, fits perfectly in the circular economy of the farm and is a welcome addition to the share, especially in winter. They also offer meat, juice, vegetables and bread.

How to organize different marketing channels on the same farm?

Risk sharing is often mentioned as the core value of Community Supported Agriculture. Theoretically, the best fitting model that respects this value should be farms selling 100% through CSA. But various studies suggest the reality is a bit different, and many farms doing CSA (the large majority in some countries) have to adapt and combine different marketing channels. For some, it is a vital necessity. For others, it is a way to diversify, and not be too dependent on one distribution channel. In any case, whatever solution is chosen, it should be carefully handled, especially in the way it is explained to the partnership members.

In our survey, two interesting features came out from question #59*"About what percentage of your CSA farm income is from the following market channels and services?":* The first result is that only a third (25/73) of the respondents reported 100% of their sales through the CSA model, meaning that the majority of farms doing CSA are also selling through other channels. The second result is that 65/73 reported getting half or more of their income from CSA. This means only a small margin use CSA as a kind of side activity, for less than half of their production. The question remains: when CSA is not the only selling model, how does one best integrate the different sources of income together?

How to combine CSA with different activities and income?

Financially, few of the CSA farmers in Hungary are in the green zone. Unfortunately, many are in the red zone. Money for investment is lacking. If the farmers say that they are doing OK, it might mean that they did not pay themselves (or others) well. Although consumers might be willing to pay more, many of the CSA farmers don’t really calculate the prices correctly, or they give more vegetables than required to the consumers worrying that they might lose them. In Hungary there are many small farms and some farmers want to follow the AMAP model with no diversification (i.e. no other direct marketing). The farmers are often shy and don't communicate their situation properly.

According to the in-depth interviews that have been conducted, it seems almost impossible for Czech farmers to be solely dependent on the income provided by the CSA. But is it really necessary? By contrast, the ability to create an appropriate mix of incomes from different sources can be a good strategy. For example, Vojta Veselý (Ecofarm Biostatek) combines three basic incomes: CSA, other farming activities and educational activities. CSA is the best way to sell sheep cheese, but, at the same time, the farm produces honey, meat, vegetable sauces and other products which they sell at events that they provide catering for. The farm is also a place that develops social agriculture. European volunteers and various excursions come to the farm several times a year. Combining these diverse incomes give the farm greater stability and financial sustainability, and gives the community in Vojta a greater diversity of life activities.

Lucile, from Normandie, France, also recalls *"what a breath of fresh air"* it was for her to realize that she could join a kind of *"Air BnB"* specifically for stays on the farm. As a cow and goat cheese maker, she had to face several sharp difficulties during the last year, including a virus that killed some of her cattle. Even if some of her AMAP groups had been offering support, it was not much compared to the new income generated by the online hosting system. Beyond the financial aspect of such an operation, Lucile believes this is also a way to transmit her passion and her skills: the stay on the farm includes several workshops, during which guests learn the basics of cheese-making. This adds value to the farm and to farm activities.

Similarly, the Welsh CSA farmer Gerald Miles emphasised in his interview that the farm tourism they established at their scenically located farm, helped a great deal to maintain the farming activities.

In Germany, the ideal SoLawi-farm produces 100% of their food for their members, but this ideal is not always a reality. Some farms use other marketing channels (e.g. direct marketing, a market place, wholesale) “side by side”. Why does it happen? Because often the income from the SoLawi alone is not enough for the farm workers. Another reason is that these other marketing channels might already have been used by the farm before starting a SoLawi. Often there is loyalty to a marketing channel that has proven to work in the past, which is a sign of stability and trust for a farm.

One principle of SoLawi is: “Sharing (between farmers and members) the risk and the harvest”. But how it is possible to share it if, for example, the SoLawi runs together with market gardening? Perhaps if a pest damages or destroys a crop harvest? Which risk is taken by the SoLawi-Members, which by the farmer and which by the market customer? The next problem is the distribution of the farm expenditures (salary, resources and investments). How much should the SoLawi take and how much should the market operation take? If there

are no clear answers provided, the SoLawi members could get suspicious ("we have to eat the rest of what comes back in the evening from the marketplace"). How can the farms manage these problems? Here are some real examples from farms:

Example 1: Big farm with wholesale marketing starts a small SoLawi

The farm produces different kinds of vegetables on a large scale (more than 30 ha). The SoLawi has 30 members. For each individual member, the variety and amount of vegetables they supply equals the average results of other SoLawis in terms of space requirement/harvest/person. The participation fee for a SoLawi member is also calculated by comparison to other farms in the first few years. If the SoLawi becomes bigger later on, a new participation fee will be calculated.

Example 2: Big farm runs a SoLawi together with sales at the market places/stores

There exists an annual full-cost plan, the turnover/income from SoLawi and marketplace/stores are shown separately, all costs are assigned for the respective channels. The participation fee for the SoLawi-members depends on the costs of the marketplace/store from the last year. 75% of these SoLawi members get their food in the marketplace/store and there enjoy a high-standard service. Store customers get the same quality as SoLawi member. If any product has limited availability, only SoLawi members get it, because: "Store customers make *something* possible, SoLawi makes *everything* possible" (quote from the farmer).

Example 3: Farm starts SoLawi aside of farm store and "box scheme"

Before the farm starts with SoLawi, they developed a full-cost-plan for a 100% SoLawi scenario to get the right participation fee for the SoLawi-members. With this price they start the SoLawi with 50 Members (100 % = 740 members). 100% is the goal and until they reach this number they run the CSA side by side to the other marketing channels like in example 1.

These observations are also a reflection of a deeper trend within our societies: multiplying activities is becoming a necessity for many, as a way to cope with economic difficulties.

CONCLUSIONS

This research shows the acute need for a specific training module to be presented to advanced CSA farmers and coordinators in order to answer some crucial questions that are still left unanswered, even by CSA farmers with more experience than others.
The questionnaire included several questions about the respondents' experience and preferences in terms of training on financial issues. One question was specifically about the way the respondents learnt their financial management skills. The results show a high

proportion of self-directed learning. When it comes to the learning preferences, there is a clear preference for farmer-to-farmer exchanges, hands-on training sessions, and visits by experienced advisors. On the contrary, e-learning, online tutorials are obviously less preferred... A mentorship system, with some experienced CSA advisors, would probably be the best way to respond to the lack of training on these issues.

The research also underlines a large room for improvement to be found in budget development, formal accounting training and knowledge of tax laws, as well as business plan, marketing and cost estimation. The results from the question "What additional research questions or subjects related to CSA financial planning would you like to see addressed?" suggests that a specific course about the legal frame, including tax schemes, should be developed. Of course, any content in the legal frame related to financial sustainability should definitely be generated in each country.

As a conclusion, we can also share some recommendations from the field research. The training should include exercises to identify the main costs of the production, as well as to understand the cash-flow of the production and to propose a subscription payment scheme in accordance with the producer's cash flow needs.

It is important to address the structure of the farm (which parts/operations are included in the CSA, how do they work?) as data is often not complete and, furthermore, the investment side is generally not acknowledged. Part of the training should encourage farmers to be more open about their issues, and to be involved in networks and exchanges. In order to achieve this, concrete examples (good and bad) and tools should be presented for inspiration through these trainings. It is an important point to acknowledge that farmers have little or no time. There is the farm work and on top of that, the bureaucracy. Finally, it should be clarified that reaching financial sustainability might not happen quickly. In recent studies among newly installed farmers (part of them CSA farmers), the usual time horizon to be able to live from the farm's production seems to be 5 years.

MODULE 1 - Management of Solidarity Based Food Systems

Introduction

This module is conceived as the gateway to the topic of financial sustainability education of Solidarity-based Food Systems (SFS) and Community Supported Agriculture initiatives (CSA). It presents the "Solid Base - Financial Sustainability Education for Solidarity-Based Food Systems" project as such along with the results of European research, which was one of the main components of the project. The module introduces learners to the underlying principles of SFS/CSA and highlights the importance of networking on both a national and European level. The most important parts bring learners an insight into topics such as legal and organizational structure, decision making, governance and sharing responsibility within community. The module is entirely composed of innovative and interactive educational techniques that involve learners in the training process in an (inter)active and entertaining way. We will build on peer learning and use student-centred pedagogical approaches like empowerment and hands-on experience.

Purpose

This module has been designed for adult learners, who have already experiencedSFS/CSA such as farmers, coordinators and other active members. Module 1 is focused on introduction to the modular training programme as a whole in the first phase, making participants aware of the interconnectivity of all 4 modules and simultaneously making it clear that each module is an individual training component that is worth attending on its own. Additionally, module 1 is an introduction to the focus topic itself, ie. financial sustainability of SFS/CSA.

Learning outcomes and objectives

The module makes participants familiar with the topics of legal structure, management, decision-making and governance, organizational structure and sharing responsibilities within community. This module also facilitates practical experience sharing: the best practices on national and international level will be also presented.

- Competencies gained through this module:
- Knowledge of SFS and CSA principles, and ability to distinguish between these distribution systems
- Awareness of umbrella organizations and networks developing CSA and Solidarity-based Food Systems

- Awareness of the benefits of networking on national and international levels
- Knowledge of the current situation of SFS/CSA on national and international levels
- Awareness of the importance of legal structure
- Knowledge of practical steps to share responsibility within the community
- Knowledge of examples of task and time management tools
- Knowledge of examples of good practices at home and abroad

The aim of the Module

This module focuses on the basic organizational and management knowledge of CSA and is primarily intended for those who are already involved in CSA and want to refresh or deepen their knowledge of CSA management. Information is provided to everyone, for farmers, consumers and for coordinators of CSA's. They will further develop their present experience through examples of case studies and various types of documents such as declarations, contracts, activity planning tables throughout the year, and distribution of responsibilities between the coordination team. Different models of CSA initiatives at the National and European level are shown. It will also focus on the day-to-day running of the initiative to show how to choose the organic standard, how to define guidelines for the day-to-day operations, how to deal with non-compliance, and how to maintain documentation and a database.

Main topics

- Introduction to Solid Base program
- Solid Base research results
- Principles of SFS/CSA
- CSA networks
- Legal structure
- Decision making and governance
- Time and task management

Facilitation and training principles

The module is composed of Powerpoint presentations, best practice examples, templates available for visualization, downloading and printing, and a booklet. As for Module 1, the

idea is to have one section for presentation and another section for self-analysis and group activities. Sharing experience among participants is an important part of education.

Module detailed content and methodology

Part 1: Getting to know each other

Icebreaker and introduction of participants

- **TARGET AND SKILLS**: Participants will feel more relaxed in the group if they know each other´s names, ideas and background, and the trainer could also easily monitor what the main focuses and the interests of the participants are.
- **CONTENT**: Presentations for participants to identify their experiences, motivation, wishes, interests and expectations
- **METHOD**: Mutual introduction
- **METHOD DESCRIPTION**: Participants create pairs, preferably with the person sitting next to them. Everybody has 1 minute to present his/her name, experiences and expectations to their partner. The trainer might facilitate the start with a few initial questions that would help motivate participants to begin talking. Examples of these might be: "Where are you from? ", "What is your experience with CSA" or "What do you expect from your training?".
  After the introduction in pairs, pairs can choose whether to introduce each other or themselves to the group.
- **TOOLS**:paper, pencil - participants can write notes
- **DURATION**: 30 minutes = 25 participants (it depends on the number of participants)
- **RESOURCES**: Facilitation techniques at http://www.seedsforchange.org.uk/tools

Option: *If you have participants from different parts of the country, a really short introduction game could be added. As a trainer, explain that the room is an imaginary map of your country and stand on the place where you are at the moment. Ask the participants to stand on the place where they came from - with you as a good reference point. When everybody has found his or her place, ask them to say to the others where they came from. This game helps them to recognise who else is coming from the same region, which is a perfect starting point for future cooperation.*

Part 2: Introduction to the topic

About Solid Base program

- **TARGET AND SKILLS**: Participants are familiar with the content of the training, and are aware of the fact that this is the first of 4 modules. They will also know about the available training materials and tools to help them in managing a CSA. It is explained to them that this is the testing phase of the educational programme, their evaluation and feedback is really important in order to finalize the intellectual outputs of the training.

- **CONTENT**: Description of the whole training programme and structure of the modules (1-4), including their interlinking. Time schedule of Module 1.
- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainer presents programme content and time schedule of M1, and briefly introduces other modules.
- **TOOLS**: projector, PP presentation
- **DURATION**: 10 minutes
- **RESOURCES**: Solid Base Module 1 Training plan, PPT presentation

What SFS and CSA is

- **TARGET AND SKILLS**: Participants are familiar with the principles of SFS and CSA and are able to distinguish between these concepts.
- **CONTENT**:
  What is a CSA - how it is defined on the European and national level. Definition by URGENCI (European CSA Research Group 2015):"CSA is a direct partnership between a group of consumers and producer(s) whereby the risks, responsibilities and rewards of farming activities are shared through long-term agreements. Generally operating on a small and local scale, CSA aims at providing quality food produced in an agroecological way." CSA provides an alternative to traditional food marketing methods: unlike retail, it focuses on engaging the consumers and maintaining small scale farms. In practice, a CSA consists of committed cooperation between a farmer or multiple farmers and a group of consumers, often reinforced through bilateral contracts. Furthermore, the CSA is more defined by its underlying principles than by its operational set-up.

  Basic CSA principles (Booklet Be part of CSA! 2016): The CSA movement has defined fundamental principles that represent a common basis for the concept globally. CSA is based on a **partnership**, usually formalized as an individual contract between each consumer and the producer, and characterized by a mutual commitment to supply one another (with resources – usually money and food) over an extended period of time, beyond any single act of exchange. The contracts last for several months, a season or a year. CSA is based on localization – **local producers** should be well-integrated into their surrounding areas and their work should benefit the communities which support them. CSA's are based on **solidarity** between producers and consumers. The whole functioning of the groups are designed on a human scale – paying a sufficient, fair price up-front in advance to enable farmers and their families to maintain their farms and live in a dignified manner, and, at the same time, the price should respect the needs and abilities of consumers. A key element is **sharing** both the **risks** and the **rewards** of **healthy production**. The

producer/consumer tandem is based on direct person-to-person contact and **trust**, with no intermediaries or hierarchy.

The definition of Solidarity-based Food System (SFS) (SOLID BASE Project 2017): *"SFS's are forms of short food supply chains which are based on solidarity economy (SE). Solidarity-based economic units rest upon a model of democratic decision-making and a participatory management system, which aims at ensuring collective responsibility for the outcomes. SFS's often produce organically, or at least in a climate-friendly way. They provide nutritious food with less ecological impact and higher social benefits."* The term "solidarity based food systems" was chosen as the umbrella term to take into account various forms of organisation, distinct from CSA, but nonetheless sharing a similar approach to sustainability, fairness and solidarity. This refers to: buyer groups, food coops and enterprises that foster direct farmer-consumer relations; social cooperatives; and others. The food assemblies are not considered an SFS model as they are largely seen as business driven approaches, and they have aroused controversy with the role they play as intermediary.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainer presents the definition of SFS and explains what the difference between SFS and CSA is. Examples of various SFS's from different countries are presented.
- **TOOLS**: projector, PP presentation
- **DURATION**: 10 minutes
- **RESOURCES**:
    - Be part of CSA! http://kpzinfo.cz/wp-content/uploads/2018/12/bpcsabooklet_2016_eng.pdf
    - video Be part of CSA! http://urgenci.net/be-part-of-csa/a-csa-short-movie/
    - European CSA Declaration, Adopted by 3rd European Meeting of CSA on 17th September in Ostrava, Czech Republic, http://urgenci.net/wp-content/uploads/2016/09/European-CSA-Declaration_final-1.pdf
    - URGENCI CSA Hub website: http://hub.urgenci.net/

Option: Instead of presentation, it is possible to use short video for repetition CSA definition and CSA basic principles.

CSA Networks

- **TARGET AND SKILLS**: Participants are familiar with personal and societal benefits which come from networking. They know URGENCI as an international CSA network, and have other examples of national networks.
- **CONTENT**: Being a part of the CSA network helps finance various aspects of new and existing CSA's including: raising the awareness of the general public and policy-makers about the benefits of community-supported agriculture; providing advice and

assistance to new and existing CSAs; creating local food supply chains; reuniting the public with local food and supporting organic farmers; and handling directories and maps to easily find the nearest farmer or CSA. Members and individual supporters use a range of discounts and offers, as well as other customized benefits such as free or reduced prices for workshops, meetings and events.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainer presents examples of CSA networks on European (URGENCI) and national levels. Trainer explains the benefits of being a network member on a personal and societal level.
- **TOOLS**: projector, PP presentation
- **DURATION**: 10 minutes
- **RESOURCES**: **CSA networks in Europe**
    - URGENCI, Europe:http://urgenci.net/
    - Miramap, France:http://miramap.org/
    - Community Supported Agriculture, United Kingdom:http://communitysupportedagriculture.org.uk/
    - The alliance for better food and farming:http://www.sustainweb.org/
    - AMPI - Asociace místních potravinových iniciativ, Czech Republic:http://www.asociaceampi.cz/, http://kpzinfo.cz/
    - Solawi - Netzwerk Solidarische Landwirtschaft, Germany:http://www.solidarische-landwirtschaft.org/
    - KöKiSz, Hungary:http://tudatosvasarlo.hu/cikk/kokisz
    - Tudatos Vásárlók Egyesülete, Hungary: http://tudatosvasarlo.hu/csa
    - GASAP, Belgium:http://gasap.be/
    - FRACP - La Fédération Romande d'Agriculture Contractuelle de Proximité, French speaking network in Switzerland:http://www.fracp.ch/accueil

Solid Base research results

- **TARGET AND SKILLS**: Participants are familiar with the main results of the research on the topic of the financial sustainability of CSA and other Solidarity-based Food Systems in Europe.
- **CONTENT**: According to the Census by a CSA Research Group in 2015, there were about **2,783 CSAs** operating in Europe and half a million (**474,455**) eaters (with estimation and using a rather narrow definition of CSA). Research on the financial sustainability of CSA and other solidarity-based food systems in Europe was an important part of the Solid Base project. It was conducted in 2018 based on: 1) literature review in Europe and North America, 2) detailed online questionnaire in 9 languages across Europe (116 respondents), 3) about 40 qualitative interviews with farmers/coordinators, 4) consumer survey (387 respondents) and exchanges at CSA farms/agroecological meetings.
- **METHOD**: Presentation

- **METHOD DESCRIPTION**: Trainer presents main results of the research conducted in 2018 under the Solid Base Project.
- **TOOLS**: projector, PP presentation
- **DURATION**: 15 minutes
- **RESOURCES**:
    - European CSA Research Group: Overview of Community Supported Agriculture in Europe, 2016. Available online:http://urgenci.net/wp-content/uploads/2016/05/Overview-of-Community-Supported-Agriculture-in-Europe-F.pdf
    - Jocelyn Parrot, Peter Volz at al.: Solid Base Research report, 2018. Available online: http://urgenci.net/solidbase-research-report-on-the-financial-sustainability-of-csa/

Part 3: Search for the right legal status

Participants´self analysis - What is the situation in my initiative?

- **TARGET AND SKILLS**: Participants realize what the current situation of their own initiative is and how it has changed since the beginning. What are the benefits and limits, and what do they want to improve?
- **CONTENT**: Participants will analyze their own CSA, focusing on their chosen legal status, and question how this mode of operation can both benefit and limit them. They will also respond to questions on the form of money flow, financing, the amount of annual income for farmers, and how the number of members increases or decreases each year.
- **METHOD**: Participants' self-analysis

  METHOD DESCRIPTION:

  Participants fill in the template with the information about their initiative. They will answer the questions:
    - What is your legal status? (for example non-formal group, association, cooperative...) Has it changed since the beginning?
    - How many members does your CSA have?
    - How many farmers does your CSA cooperate with?
    - What is the early financial turnover in your CSA?
    - What is the price share?
    - What is the membership fee for consumers and for farmers?
    - What is your payment scheme? Do members send money directly to a farmer or to a CSA bank account?
    - Who is responsible for tax-related issues? (farmer, members, initiative)
    - What are obligations and consequences (including opportunities) related to legal status and the overall CSA situation?

This activity gives the participants space to "give all the information out of the paper," and an opportunity to think about their initiatives´ development over time.
Method in practice:
    - Participants are equipped with a template and are instructed, by the trainer, about the method.
    - Every participant works separately with their own template. Participants may work in a group if they belong to one CSA, for example.
- **TOOLS**: template A4, pencils
- **DURATION**: 10 minutes
- **RESOURCES**: Template M1.1.

Introduction to the topic

- **TARGET AND SKILLS**: Participants are aware of the fact that legal status is an important aspect that influences the overall functioning of a CSA.
- **CONTENT**: Legal structure is a very important aspect that is sometimes neglected despite the fact it strongly influences financial systems, decision making, and ability to share responsibility within an SFS initiative. There are a variety of obligations and consequences (including opportunities) that accompany the different types of formal and informal arrangements and legal forms. For example, it is crucial to understand the tax system to which a specific operation is subject.

  Some smaller projects, which do not intend to employ staff or have any assets, such as producer-consumer partnerships, can be based on an informal arrangement. A simple contract, drawn up between members and the producers, may be all that is required. As an initiative increases in size and complexity, though, it is wise to have clearly defined rights and responsibilities which are recognised in law.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainers highlight that the topic of legal status is worthy of consideration, because of the variety of obligations and consequences (including opportunities) that adhere to the different types of formal and informal arrangements. Trainers present key questions that every CSA/SFS should consider before they choose their legal status. (see the list of questions in the booklet)
- **TOOLS**: projector, PP presentation
- **DURATION**: 10 minutes
- **RESOURCES**:
    - Cultivating Co-operatives, organisational structures for local food enterprises: https://ldn.coop/wp-content/uploads/2015/01/Cultivating_Cooperatives-1.pdf
    - Simply Legal: All you need to know about legal forms and organizational types https://www.uk.coop/sites/default/files/uploads/attachments/simply-legal-final-september-2017.pdf

- The A-Z to setting up a CSA: How to set up and run a successful community supported agriculture, Legal structures https://communitysupportedagriculture.org.uk/resource/legal-structures/
- The hive: http://www.uk.coop/the-hive/

Best practice examples on national and international level

- **TARGET AND SKILLS**: Participants know what the typical CSA legal models in their country are, what their obligations and consequences (including opportunities) related to tax schemes are, and who is responsible in CSA for tax-related issues. Participants are inspired and motivated by existing and successful examples of different CSA models from a national level and from abroad.
- **CONTENT**:
  Several real examples of CSAs with different legal status types are described in the following aspects:
  - What is the legal status?
  - What are obligations and consequences (including opportunities) related to legal status?
  - What does a cash flow scheme look like?
  - Who is responsible for tax-related issues? (farmer, initiative, members…)
- **METHOD**: Presentation
- **METHOD DESCRIPTION**:
  Invited CSA farmer/coordinator, or the trainer, presents in detail his/her own CSA situation related to legal status.
- **TOOLS**: projector, PP presentation
- **DURATION**: 20 minutes
- **RESOURCES**: own examples

Sharing experience - discussion

- **TARGET AND SKILLS**: Participants realize what the current situation of their own CSA is. Participants are aware of the obligations and consequences related to legal status of their own CSA. Participants clarify whether their legal status meets their current situation and needs, eventually identifying gaps for improving.
- **CONTENT**: Based on self-analysis in the beginning of the session, participants will discuss what they have learned. What limits do they face in terms of their own CSA/SFS development? What do they want to change?
- **METHOD**: Discussion
- **METHOD DESCRIPTION**:
  Participants, led by the trainers, discuss and share experiences. Each participant is supposed to present to the others what he/she has learnt during the session. Discussion gives participants an opportunity to compare their own situation with the others'.

- **TOOLS**: form A4, pencils
- **DURATION**: 20 minutes
- **RESOURCES**:

Part 4: Decision making and governance

Introduction to the topic

- **TARGET AND SKILLS**: Participants are aware that there are different roles within the SFS/ CSA that are important for its success. Further, they learn that initiatives should not be centred around one or two people.

CONTENT:

The simple initiatives simply consist of farmers and consumers, however, very often, they need a broader group of involved actors. The way the initiative is set up and governed, including decision making and sharing responsibilities, helps avoid stress down the line. For example, delegating specific roles can prove advantageous and free up more time for the farmer to work on the field, such as if someone else is involved in the delivery or group coordination.

It is essential to share responsibilities clearly and decide within the community in a participatory way. Make sure there is no vacuum of responsibility. For organisational development, it is necessary to ask the following questions:

- Do we need to make a decision?
- Who is involved in the decision-making process, when and how?
- Do the affected actors want to be involved in making the decision?
- Which organs (working groups, forums, plenaries, boards of directors, etc.) does the organisation consist of? How are the roles assigned and defined?
- What are the relevant domains of these bodies? Which special areas do they deal with? Where can they decide autonomously, where do they need the approval of other bodies? Do they need money, if so, where does it come from?
- Who executes the actions after a decision is made and when?

Only when these questions are well answered can an organisation successfully establish flat hierarchies. It is important that everyone in an organization knows which organs exist and

what their competencies are. Transparency within the organization is important. People want to know what their job is and that of the others. Then, satisfaction and productivity are more likely to arise naturally and leadership becomes easier.

METHOD: Presentation

METHOD DESCRIPTION:

Trainers explain who the main actors are within a CSA (farmer, coordinator, consumer) and what their role generally is.

TOOLS: projector, PP presentation

DURATION: 15 minutes

RESOURCES:

Collective of authors: Training in Alternative Food distribution Systems (AFDS), Regional logistics, 2015. Available online: http://urgenci.net/wp-content/uploads/2015/01/Training-in-AFDS_final_print.pdf

Participants´self analysis - What is my role

- **TARGET AND SKILLS**: Participants analyze their own role in CSA.
- **CONTENT**: Participants will be aware of their roles that they actively perform in the CSA initiative. By asking questions, they answer what role they choose, what they believe they are doing, and what they need for their performance. They also assess what they want, what their knowledge needs, and what they can learn through their chosen role.
- **METHOD**:
  Activity 1: Participants´self analysis - Pyramid of my role in CSA
  METHOD DESCRIPTION:
  This method is based on the concept of the "Logical levels (pyramid)" invented by Robert Dilts. A practical activity where each participant writes their answers to the questions in the prepared form. Who am I? What do I want to do in the role? These relate to the role or roles that a participant in a CSA might hold. Along with the role, they write, for example, the values, beliefs, abilities, ways of acting, and behaviour which are linked to the chosen role. During writing, the content of the role for the individual is thought up. After completing the "pyramid", the participant assesses whether he/she fulfills the role, what benefits come from it, and what limits he/she has found.
  Method in practice:
    - Every participant works separately with their own template and answers the questions. (5 minutes)

    - Participants can share their findings and experience in pairs. (10 minutes)
- **TOOLS**: Analysis Sheet and blank sheet A4 for every participant, pencils
- **DURATION**: 15 minutes
- **RESOURCES**:
    - About mind map and pyramid of rolls: http://www.mindmapmad.com/robert-dilts-logical-levels-mind-map/
    - Logical levels of change - Robert Dilts: http://discoveryinaction.com.au/logical-levels-of-change-robert-dilts/

Option: Participants who are not active members in the CSA can fill the "pyramid" with the idea of what role they think they could hold. This exercise is done by thinking about their own values, beliefs, simply by themselves. They can discover their undisclosed qualities, offer them to the CSA initiative and become an active member with their own role and responsibilities.

Best practice examples on national level and from abroad

- **TARGET AND SKILLS**: Participants are familiar with real CSA examples in terms of management structure, decision making and sharing responsibilities.
- **CONTENT**:
  Presentation of different models of CSA from its real actors (for example CSA coordinator or farmer) or from the trainer. There are models presented from the country and also from abroad. The presentation should contain:
    - CSA management scheme - short summary of principles
    - How the scheme was set-up, and how it developed in the next years
    - Summary of responsibilities of people involved in a coordination group
    - Rules for responsibility sharing within a community and decision making (who, how, when, where, about what)
- **METHOD**: Presentation
- **METHOD DESCRIPTION**:
  Trainer or invited CSA farmer/coordinator presents in detail the management structure of real CSA initiatives.
  TOOLS: projector, PP presentation
- **DURATION**: 20 minutes
- **RESOURCES**:

Participants´self analysis and discussion

- **TARGET AND SKILLS**: Participants analyze their CSA in terms of decision structure, governance, management roles and responsibilities, and identify gaps for improvement. Participants get feedback in a group discussion.
- **CONTENT**: Participants realize how responsibility is distributed among people in the community. Based on sharing experience and discussion with others, participants are inspired by different organisational models.

- **METHOD**: Participants´self analysis and discussion
  Activity 2: Mapping the actors and their roles in CSA
  Activity 3: Group discussion
- **METHOD DESCRIPTION**:
  Activity 2: Mapping the roles in CSA (10 minutes)
  This method is based on mind mapping, which is a highly effective way of getting information in and out of your brain. Mind mapping is a creative and logical means of note-taking and note-making that literally "maps out" the thought process of an idea.

  One simple way to understand a Mind Map is by comparing it to a map of a city. The city center represents the main idea; the main roads leading from the center represent the key thoughts in your thinking process; the secondary roads or branches represent your secondary thoughts, and so on. Special images or shapes can represent landmarks of interest or particularly relevant ideas.
  The great thing about mind mapping is that you can put your ideas down in any order, as soon as they pop into your head. You are not constrained by thinking in order. Simply throw out any and all ideas, then worry about reorganizing them later.
  Method in practice:
    - Participants are equipped with a blank sheet of paper and are instructed by the trainer about the method. In the presentation, the trainer can present an example of a completed mind map.
    - Every participant works separately and creates a map of main actors and roles in his/her CSA management.

  Activity 3: Group discussion (30 minutes)
  Participants together with trainers discuss previous activities. Each participant is supposed to present to the others what he/she has learnt.
- **TOOLS**: Analysis Sheet and blank sheet A4 for every participant, blank sheet of paper A1, markers
- **DURATION**: 40 minutes
- **RESOURCES**:
    - Mindmapping - Note taking that literally maps your ideas
      https://www.mindmapping.com/

Part 5: Time and task management

Introduction to the topic

- **TARGET AND SKILLS**: Participants are aware of the fact that the overall functioning of a CSA is based on well the organized management of everyday tasks, their sharing, time management and communication. They have knowledge of the Gantt chart, or other useful tasks, and time management tools.

- **CONTENT:**

  In the case of SFS, where multiple different kinds of tasks arise at the same time (etc. farming, communication, delivery, community building), well-planned and conscious coordination, task-sharing and cooperation are crucial success factors.

  How to plan and manage tasks

  - Map the activities and processes
    First identify main activities needed to ensure your initiative or farm running smoothly. These could be, for example, production, distribution, membership, finance, delivery point, volunteers etc.
  - Break activities down into tasks
    Go deeper in every activity. What steps and tasks have to be done to finish an activity?
  - Plan tasks in time
    How much time does it take for the task to be done? What is the deadline? Does work depend on completing another task?
  - Assign task to responsible members from your community
    Who takes responsibility for the task? It has to be just one person, despite the fact that there might others who collaborate.
  - Create system of task sharing and tracking
    How do you know that the task is in progress or finished? How do you share tasks within your community? Who is responsible for what? What has to be done next week? Which task has the priority? You need to develop a system that enables you to share and track tasks in time. Create clear and simple communication rules.

  Tools for task management

  The need for management and communication tools are directly linked to the level of complexity of an initiative. The less direct the exchanges are, the bigger the initiative is, the greater the need for various tools to solve everyday tasks effectively. Today there are plenty of online tools that help you to organize and track tasks from simple to-do lists to systems that offer task creation, visualization, and notification capabilities such as famous www.asana.com, www.basecamp.com, www.notion.so, www.trello.com and other commercial softwares. In the chapter “Digital tools” we offer a list of Free Libre Open Source tools that can help you better manage your initiative, communicate with your members and share responsibility.

  A Gantt chart (www.gantt.com), commonly used in project management, is one of the most popular and useful ways of showing activities (tasks or events) displayed against time. On the left of the chart is a list of the activities and along the top is a suitable time scale. Each activity is represented by a bar; the position and length of

the bar reflects the start date, duration and end date of the activity. You can create a time plan with special software, or you can create a simple chart in Spreadsheet too.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Presentation
- **TOOLS**: projector, Powerpoint presentation
- **DURATION**: 15 minutes
- **RESOURCES**:
    - What is Gantt chart: www.gantt.com

Sharing experience - discussion

- **TARGET AND SKILLS**: Participants share their experience and get inspiration from others.
- **CONTENT**:
  Learners together with trainers discuss and share experience with time and task management tools. Discussion gives participants the opportunity to get inspired from others.
- **METHOD**: Discussion
- **METHOD DESCRIPTION**:
    - Participants are divided into smaller groups.
    - In every group, participants identify useful task management tools and practices.
    - Finally, all groups will share their ideas together.
    - Best practices are written on flipchart paper.
- **TOOLS**: blank sheet of paper A1 for every group, markers
- **DURATION**: 30 minutes
- **RESOURCES**:

Volunteers and task delegation

- **TARGET AND SKILLS**: Participants are familiar with steps and rules that can help with involving volunteers and task delegation.
- **CONTENT**:
  Most CSAs rely, to some extent, on voluntary help. This can be very beneficial for everyone involved, including the farm, the community and even the volunteers, who may learn new skills, meet new friends, learn more about food and farming, or get fit and improve their mental health. However, maintaining volunteer motivation is usually challenging. Each volunteer is an individual and what is seen as motivation for one individual may not be for another.

  Tips to help you involve volunteers in your community and delegate tasks (details in the booklet):
    - Show respect
    - Define and describe the tasks

    - Offer diversity of tasks
    - Find a suitable person in your community
    - Explain every step and clarify understanding
    - Guide and communicate
    - Set the rules together
    - Give feedback
    - Make volunteers comfortable and safe
    - Do not forget praise
    - Offer workshares
    - Find a “woofer”
- **METHOD**: Presentation and discussion
- **METHOD DESCRIPTION**: The content above is presented by the actors of the local CSA schemes or someone with experience from abroad
- **TOOLS**: projector, Powerpoint presentation or photos
- **DURATION**: 15 minutes
- **RESOURCES**:
    - The A-Z to setting up a CSA: How to set up and run a successful community supported agriculture, Volunteers http://communitysupportedagriculture.org.uk/wp-content/uploads/2018/06/V.pdf
    - Positive Practice in Farm Labour Management: Keeping Your Employees Happy and Your Production Profitable https://attra.ncat.org/attra-pub-summaries/?pub=278

Sharing experience - discussion

TARGET AND SKILLS: Participants share their experience and get inspiration from others.

CONTENT:

Learners are encouraged to discuss and share their experience with volunteers and task delegation.

METHOD: Discussion

METHOD DESCRIPTION:

- Participants share their best experience. How does it work in your community? How successful are you with volunteers’ involvement? What helps you to motivate volunteers? How do you manage volunteers?
- Best practices are written on flipchart paper.

TOOLS: blank sheet of paper A1 for every group, markers

DURATION: 30 minutes

RESOURCES:

Part 6:. Conclusion

Evaluation and Follow-up

- **TARGET:** Organizers of the event get feedback from participants on the quality of the training, participants once again re-think the training content and used methodology and have a time to share their feelings and get introduction to the next session.
- **CONTENT:** Evaluation of the session
- **METHOD:** Evaluation form and discussion
- **METHOD DESCRIPTION:** Participants fill in the prepared evaluation form and discuss with the facilitator and lecturers the content and methodology.
- **TOOLS:** Evaluation form in a hard copy
- **DURATION:** 30 minutes
- **RESOURCES:**

MODULE 2 – Financial planning

Introduction

SFS's are similar to small-scale farm businesses, but an essential important characteristic of these initiatives is that their operation is based on a community financing model. Consumers join one or more small-scale farms and pay a fair price for the produced food. In order to reduce liability risk and ensure the long-term financial sustainability of these social businesses, innovative methods and creative financial arrangements are needed, which requires business knowledge and financial experience. However, according to the needs analysis, this is often a difficulty for farmers and consumer coordinators because there is no available guidance which they can follow. M2 is dedicated to improving knowledge and skills which can support farmers and their customers in building a financially viable business.

Target group

The second module is for those adult learners who are planning or already engaged in the operation of SFS's, and will be/are involved in the community based management and operation. The partner organizations primarily tested the module with stakeholders of CSA communities, but the topic could be relevant for other local solidarity based food communities (e.g. buying groups, cooperatives or community managed farmers market etc.) in which the democratic and participative operations heavily rely on the local communities.

Prerequisites

Ideally, to ensure continuity, adult learners should participate in the M1 training event before attending M2, but with a use of a selection method (e.g. questionnaire, personal interviews) some participants with practical experience in the community based management of SFS's could also join . It is also advised to invite stakeholders with different experiences (e.g. farmers, business owner, financial managers, and coordinator) as module 2 focuses on the whole business model and operation of SFS's.

The aim of the Module

The second training module of Solid Base puts special focus on the business and financial operation aspects of SFSs which require specific skills and knowledge: business planning, participatory budgeting, tasks sharing, and decision making.

Main topics

The main topics of the module are:

financial sustainability

business planning

building a financial system

making a budget

Targets and outputs

Adult learners of the second module gain special soft skills which are needed for the successful management of SFSs initiatives:

Basic business skills for social entrepreneurship.

Facilitation of group based decision-making and planning.

Ability for short and long term planning

Ability for financial management

Problem solving and conflict management skills

Facilitation and training principles

Training methodology applied in the test training events will follow the participatory approach of the Solid Base training program. This includes intensive participation of individuals, interactive group work, group based planning, future planning, short presentations, giving feedback, individual tasks, work in pairs and problem-solving schemes. Participants will also have the chance for informal experience sharing during the breaks.

Module detailed content and methodology

Part 1: Introduction

INTRODUCTION OF TRAINERS AND PARTICIPANTS

TARGET AND SKILLS: Participants feel more relaxed in the group if they know each other ´s names, ideas and background, and the trainer could also easily monitor what the main focuses and interests of the participants are. Participants get familiar with

talking about themselves and their ideas within a training situation and participating actively.

CONTENT: Presentations by trainers and participants to identify their experiences, motivations, wishes, interests and expectations

METHOD: Introduction in big circle

METHOD DESCRIPTION:

Trainers introduce themselves, their background, and experiences, and describe their roles within the training. They also introduce assistants and explain the main scope and rules of the day (admin, timeframe, lunch, coffee breaks).

Participants create a big circle and introduce themselves. Everybody has 2 minutes to present his/her name, experiences and expectations. The trainer might facilitate the start with a few initial questions that would help participants to start. These might be: "Where are you from?", "What is your experience with CSA?" or "What do you expect from our training?".

TOOLS: -

DURATION: 30-40 minutes (it depends on the number of participants)

RESOURCES: -

SOLID BASE PROGRAM AND THE TRAINING DAY

TARGET AND SKILLS: By the end of this session, participants will get a view of the purpose of the day. Participants are familiar with the content of the training, are aware of the fact that this event is the second part of 4 modules and know about the available training materials and tools to help them in managing a CSA.

CONTENT: Description of the whole training programme and structure of the modules (1, 3 and 4), including their interlinking. Schedule of Module 2.

METHOD: Presentation

METHOD DESCRIPTION:

Trainer presents programme of Solid Base programme, briefly introduces other modules as well:

1) Management of Solidarity Based Food Systems
2) Financial sustainability (M2)
3) Digital skill sharing

4) Participatory inclusion techniques

Trainer present schedule of M2:

1) Introduction
2) Business & Finance
3) Planning exercise
4) Closure

TOOLS: PPT slides 1-3

DURATION: 5 minutes

RESOURCES:

About Solid base training programme: https://urgenci.net/solid-base/

Solid Base Module 2 Training plan

WHAT DOES FINANCIAL SUSTAINABILITY MEAN?

TARGET AND SKILLS: Participants are familiar with the definition of 'financial sustainability' used in Solid Base and the main results of the research on the topic of financial sustainability of CSA and other Solidarity-based Food Systems in Europe (2018).

CONTENT: Sharing definition and highlighting relevant results of the research

METHOD: Presentation

- **METHOD DESCRIPTION**: Trainer shows the definition of the financial sustainability of CSAs: "the ability of the farmer (or farmers) and the CSA community to maintain both the farm(s) and the CSA initiative in the long-term. In order to achieve this long-term resilience, the farm should not depend on specific external grants or donations, and should not transfer debts either to the next generation of farmers, or to the community". Trainer explains that this definition was elaborated by all project partners of Solid Base and defines the baseline of this project. Main results of the research conducted in 2018 under the Solid Base project are presented as well,
- **TOOLS:** PPT slides 4-11
- **DURATION:** 15 minutes
- **RESOURCES:**

Jocelyn Parrot, Peter Volz at al.: *Solid Base Research report*, 2018. Not available online, included in supporting materials for training.

Part 2: Business & Finance

BUSINESS 101

TARGET AND SKILLS: By the end of this session, participants understand the difference between business and finance. They are familiar with the importance of a business plan and a good financial system, and understand both in detail.

- **CONTENT:** Explaining the terms 'business' and 'finance' and listing their main elements, highlighting the importance of both to financial sustainability. Planning is essential to the success of any initiative.
- **METHOD:** Presentation and Q&A
- **METHOD DESCRIPTION**: Trainer makes a short presentation about business plans and financial systems. Trainer explains the terms, their elements and importance in CSA viability.

  Business and Finance are different, but very connected. *Business* is to earn money by selling products and/or providing services. Talking about business is to talk about what's happening in a CSA/SFS/LSPA in a structural way. When it is written, it's called the… *Business Plan*: a written document describing the nature of the business, missions and goals, the value proposition, the production and distribution channels, marketing, resources, partners and operation. It also contains a financial projection. Trainers should be able explain following elements:

  - mission, vision, goal: your dream and how you achieve them
  - value proposition: why a customer should choose your product over another, what is the unique value the product provides over its competitors.
  - production & activities: what and how you produce, all product, list of services
  - resources & people: infrastructure, money for invest, people involved, staff, contractors

- selling, marketing: how and where the distribution is going on, where and how you find customers
- customers: who they are, the different segments, their preferences, how they connect to the business, types of relationships that you establish with customers
- partners: ?
- management (incl. risk): how your business operates, internal rules and regulations, principles and protocols
- the world around us: competitors, network, legal environment affecting your business' life

A business plan could also be a 100 page long document and a big drawing as well. A business plan describes the present and contains projections for the future. Evaluating it, improving it continuously, and sharing this plan with staff members is also crucial.

Finance is to use and manage money to ensure viability. A CSA has financial viability if it is able

- to pay bills when due (liquidity)
- to generate enough income to cover all costs and make profit (profitability)
- to own money when all debts are paid (solvency)

To ensure viability a good *Financial System* must be set up. It is important to mention that financial systems have a logic which should be also applied in CSA's. A good financial system should contain:

- budget: overall picture of financial elements in a certain period
- plan & register of production, incomes, expenses, debts and claims (all items)
- cash & bank account balances (when money is moving), cash-flow plan (when, how much, how, to who and from who)

- calculate profit & loss, calculate break-even point

- controlling (1. recording – 2. monitoring – 3. analysing - 4. intervention =>This process should be done in CSAs as well to follow the budget and identify the problems and take actions)

- bookkeeping (records and reports based on needs of national laws, rules and regulations)

Managing a CSA's finance is not equal to bookkeeping. While the internal financial system provides an up-to-date picture about what is happening with money, bookkeeping is the fulfilment of financial laws. The importance of an internal recording system must be highlighted. Many CSA's work with a bookkeeper, but all of the data should be recorded and/or seen (!) for internal use as well, so it can be analysed continuously by the owners and leaders. This allows them to know what is happening in the business. It can be started in a simple way, and improve continuously.

- **TOOLS:** PPT slides 12-13

- **DURATION:** 10 minutes

- **RESOURCES:** There are several books and courses to explain this knowledge, and can help to improve even small scale farmers.

  - Sharing the Harvest: A Citizen's Guide to Community Supported Agriculture, Elizabeth Henderson and Robyn Van En, 2007.

  - The CSA Handbook: What to do with your CSA's harvest, Laura Lunn, 2012

  - Starting and Operating a CSA Farm Business (2015, USA), http://www.ctfarmrisk.uconn.edu/documents/CSA-Guide.pdf

  - The Market Gardener: A Successful Grower's Handbook for Small-scale Organic Farming, Jean Martin Fortier (book, film, tools) http://www.themarketgardener.com/

  - Equiterre – A guide for the management of CSA Farmers (2002, Canada)

  - A Guide For The Establishment of Community Supported Agriculture farms In Victoria (2004 Australia) , https://foodskil.files.wordpress.com/2012/05/a-guide-to-csa-in-victoria.pdf

- Four viable and enviable economic models of CSA (2005, USA)
- Grower to Grower: Creating a livehood on a fresh market vegetable farm
- The Organic Farmer's Business Handbook: A Complete Guide to Managing Finances, Crops, and Staff - and Making a Profit, Richard Wiswall, 2009
- Crop Planning for Organic Vegetable Growers, Frederic Theriault,2012
- Building a Sustainable Business: A Guide to Developing a Business Plan for Farms and Rural Businesses, Gigi DiGiacomo, Robert King and, Dale Nordquist (2003) https://www.misa.umn.edu/publications/buildingasustainablebusiness
- Organic Transition: A Business Planner for Farmers, Ranchers and Food Entrepreneurs, 2015 https://www.sare.org/Learning-Center/Books/Organic-Transition

BUSINESS PLANNING EXERCISE

TARGET AND SKILLS: Participants are able to define their business goals and sketch up a quick business plan. They get an understanding of making a business plan and improve it continuously.

CONTENT: Individual work on mission, vision and goals, and work on a business plan in group

- **METHOD:** Individual and group works, peer learning
- **METHOD DESCRIPTION**:

  1st exercise: Vision, mission and goals

  Trainer screens ppt slide and explains shortly the following terms and its importance.

  - Vision: how your farm or business will look in 5, 10 or 25 years, what's your dream or wish, a picture in your mind about the future? This is a description of how you would like the CSA to look in the future.
  - Mission: rolls your values, current situation and vision into a set of guiding principles that describe your business. This is a description of the CSA now.

- Goals: With a vision and mission in mind, you and your planning team are ready to begin the process of goal setting—that critical first step towards the development of a working strategic plan with measurable objectives.

Trainer distributes the handout and asks participants to fill out the A side, to answer 3 questions in 10 minutes:

- What is your CSA's vision? How will your farm or business look in 10 years?

- What is your CSA's mission? What are the most important values that describe your business now?

- What are your CSA's goals? What is the critical first step towards your vision and mission? Please define some measurable objectives.

You should emphasize that it is very important to have visions and goals, which could be broken down into activities. Business goals can be broken down further into marketing, operations, human resources and finance objectives. Here and now, trainers should keep focus on financial issues. It is also important to highlight that a CSA's financial life is strongly connected to, but must be separated from, family budgets and other business activities.

To help participants, trainers can give some examples.

- *Possible visions are: a big, nice farm*

- *Possible missions are: feeding 100 families, build up a living family farm*

- *Possible financial goals are: increasing incomes; decrease debt; decent wage for the farmer; produce healthy food; working for sustainability; increase membership for 80 families; double the territory of production; buy a new tractor etc.*

The rainer will ask a few participants to share their issues/goals in 1-2 minutes. The trainer's task could be to keep the discussion within the time limit, and help participants to define their goals and issues, and avoid 'complaining'.

<u>2nd exercise: Business plan</u>

The trainer makes groups of 5 and asks them to make a quick business plan of an imaginary CSA. Trainer shows the slide on 'Business plan' and explains the exercise.

The financial sustainability of a CSA should be ensured through long-term planning and continuous monitoring and reflection. It is therefore necessary to have a medium/long term business plan which contains several parts. In this exercise participants elaborate a simple business plan of an imaginary CSA during a group discussion. Each group answers the following questions and fills the handout's box on the B side.

- What is your CSA's value proposition? Why should a customer choose your product over another, what is the unique value the product provides over its competitors?
- What are you doing in your CSA? Please list the product groups and services that you offer.
- What kind of resources do you use? Please list the main infrastructure that you have and what you need, who will contribute in your business (staff, regular subcontractor)?
- How will you distribute your product? How and where is the distribution going ? Where and how do you find customers? What kind of marketing channels do you use?
- Please describe your possible customers: Who they are, what are their main characteristics, their preferences? How do they connect to the business, what type of relationship can you establish with customers?
- Please list your main partners: Who they are? How are they necessary for your business?

To help the participants, the trainer can give some examples.

- *value proposition: healthy and sustainable food directly from a small scale family farmer*
- *production & activities: 50 varieties of vegetable, milk & eggs, jams and cans, workshops, accommodation for tourist, crops*
- *resources & people: land, tools, cars, workers, volunteers, bookkeeper, CSA coordinator*

- *distribution: 5 distribution points, Sunday market in the city, cheese factory, home delivery*
- *marketing: social media, leaflets, ads, networking*
- *customers: individuals, families, mass buyer, local shop*
- *partners: suppliers, national CSA network, distribution points,*

Participants discuss questions from the B side of handout and their answers, together, in 20 minutes (only bullet points). Participants use their own experience and they should elaborate a coherent plan. Trainer asks all groups to share their answers and their thoughts about the process (20 minutes). Trainer mentions that there are several books and courses to explain this knowledge, which can even help to improve small scale farmers as well. The business plan should be evaluated and improved continuously. Participants are advised to continue the exercise at home, based on the guiding questions, with the participation of other stakeholders (family members, main staff etc.)

- **TOOLS:** PPT slides 14-15, Handout

The handout is a simple A4 size sheet, printed on both side, like this:

What is your CSA's VISION? *How your farm or business will look like in 10 years?*

What is your CSA's MISSION? *What are the most important rolls your values that describe your business?*

What are your CSA's GOALS? *What are the critical first step towards your vision and mission? Please define some measurable objectives.*

BUSINESS PLANB SIDE

What is your CSA's value proposition? *Why a customer should choose your product over another?*

What are you doing in your CSA? *Please list the product groups and services that you offer.*

What kind of resources do you use? *Please list the main infrastructure that you have, and what you need, who will contribute in your business (staff, regular subcontractor)?*

How do you distribute your product? *How and where is the distribution going? Where and how do you find customers? What kind of marketing channels do you use?*

Please describe your possible customers: *Who they are, what are their main characteristics, their preferences? How are they connected to the business, what type of relationship do you establish with customers?*

.

Please list your main partners: *Who they are? How are they necessary for your business*

- **DURATION:** 60 min
- **RESOURCES:**

- Non-profit Enterprise and Self-sustainability Team: https://www.nesst.org/tools-for-entrepreneurs
- Toolbox for farmers (business, farming, financial etc.) https://farmanswers.org/Toolbox
- US Departed of Agriculture – New farmers https://newfarmers.usda.gov
- Solid Base Research & Portfolio, 2018 - UK CSA Network:
    - Budgeting and Managing Money for CSAs
    - Marketing CSA- Growing and Keeping your Membership
    - Overview of a business plan
- Business Model Canvas for small companies https://www.strategyzer.com

CSA CHARACTERISTICS

TARGET AND SKILLS: Participants are aware of characteristics that could define a CSA's business and financial system. They are able to recognize the importance of these differences, and to interpret other resources from this point of view.

CONTENT: learners discuss unique elements of CSAs which make a difference

- **METHOD:** Brainstorming and discussion
- **METHOD DESCRIPTION:** There are several books, courses and learning programmes to explain this knowledge which can help to improve small scale farmers as well However, trainers must emphasize that CSAs have a lot of specific elements that create serious differences from regular businesses. Trainer asks participants to write at least 3 of these characteristics on post-its in 5 minutes. Trainer can give some simple examples and asks participants to think of their own CSA as a business. Trainer asks every participant to explain their ideas, and invites everyone for a discussion if they have a question or notes. Post –it notes are put on a flip-chart, and the trainer organizes similar ideas into groups. Trainer ensures that all of the following items are discussed & explained, and screens the ppt if many are missing.

  Main specialities are:

- solidarity and transparency: importance and how it works in practice see module 4
- share: eaters and members, not consumers; total cost of production, operation and distribution divided per numbers of members
- ‘pricing’: fair prices; fee of shares, not of products; how you calculate the “fee for members”,

One example: Distribution of production cost: we could identify in Hu that the fee is quite similar in each vegetable CSA. What is the reason for that? Are the budgets all very similar? How do farmers calculate the “fee”? Optional discussion with the participants about their practices.

- ensure decent living for farmers: it is an important financial goal, principle, value proposition
- low marketing costs: fixed custosmers (exact list, with contact), long term commitments of members, marketing in the beginning of the season (get new members if it is needed)
- risk sharing: fail of production (within limits) does not harm agreement with members, able to answer to the flexibility of production and needs
- long term commitment (income can be planned, but hard to react to unexpected events)
- secure income: revenues can be foreseen and agreed upon in the beginning of the season, fixed customers,
- distribution: eaters receive what farmers produce, all production is distributed
- delivery: sharing points, fixed dates and locations
- cash flow specialities: lots of spending in spring time, paying from members in each month/3 month/whole season
- small scale business in strong connection with family life

- lifestyle choice: not only earn money, being a member/leader of community
- what does profit mean in a CSA: revenue of the farmer? revenue of the owner? reserve for future investments?

- **TOOLS:** Post its, flipchart paper, PPT slide 16
- **DURATION:** 30 min
- **RESOURCES:**

▫ *Part 3: Planning exercises*

FINANCIAL SYSTEM

TARGET AND SKILLS: Participants get familiar with working examples of CSA's financial system. They are able to share their stories and learn from each other.

CONTENT: Learning from a real example of CSA's financial systems.

- **METHOD:** Presentation, sharing experiences, peer learning
- **METHOD DESCRIPTION**:

(1) As the business plan is settled, a crucial aspect of ongoing success is the ability to compare the actual situation at any time to the plan, and to take action when changes are necessary. To do that, a good record keeping and monitoring system is needed.

- Make and implement a plan: Who is responsible for what in relation to implementation? It is important to distribute the responsibility of specific tasks and create a realistic timeline.
- Monitor what's happening: How will you measure and evaluate the development of your activities? Think about indicators! It could be, for example, the amount of produce grown and sold; number of shareholders; number of people engaged in events; number of volunteers who help you at the farm etc.
- Record data: Keep records and check your progress towards the goals you set so you can see how your plan is working. Good records alone do not ensure that the organization will be successful; however, success is unlikely without them.

- Analyse and evaluate the situation: Evaluate how the plan is working and make corrections and refinements as time goes by. If the work you are doing doesn't help you reach your goals, or if something just does not work out the way you expected, it's time to revisit the plan. Goals may need revision from time to time.

- Take action and intervention: Do not be afraid of changes, however, keep in mind that the decision has to be based on valid data and a clear understanding of the current situation. Improve processes, reduce costs or increase prices. Be creative, seek innovative solutions, and do not forget to educate yourself. Network with other farmers and initiatives, share ideas and experience with them.

(2) Trainer will ask participants to draw up or write down the main elements of their financial system in 10 minutes. An experienced CSA farmer or coordinator explains how he or she manages the finances in their CSA. *(Option: trainer can use Research Portfolio to demonstrate an example)*. Trainer asks some participants to share their stories and involve others in the discussion. This discussion should not focus on the details of the budget, but the system, peoples, process and protocols. Trainer can be prepared with some real examples from the Research Portfolio and ask some guiding questions to the farmers and to participants if it is necessary.

- which kind of tasks he or she has regarding finances?

- when does he/she make calculations? end of the year? twice a year? end of every month?

- who are the people involved? the book keeper? coordinator?

- what kind of register he/she has?

- does he/she know their cash/bank balance right now (y/n)?

- how he/she calculates the prices of shares?

Trainer summarizes the discussion. Financial systems are best kept simple and appropriate to the group size and concept. A good financial system should contain:

- budget

- plan & register of production, incomes ,
- register of debts (buyer) / liabilities and claims (suppliers) / receivables
- cash & bank account balances
- cash-flow plan (when, how much, how, to who and from who cash flows)
- calculate profit & loss, calculate break-event point
- controlling system (1. recording – 2. monitoring – 3. analysing - 4. intervention)
- bookkeeping (fulfill national financial rules and regulations)

- **TOOLS:** Papers, pen, presentation of experienced farmer, PPT slides 17-20
- **DURATION:** 30 min
- **RESOURCES:** Solid Base Research & Portfolio, 2018

There are several online communities with tools to track financial management tasks which are critical to maintaining effective farm business practices, for example: New Entry Sustainable Farming Project https://nesfp.org

MAKING A BUDGET

TARGET AND SKILLS: Participants understand what a budget is and are able to make one for their own SFS business. They are familiar with budget categories of a CSA. They are able to know the difference between budget planning and financial planning. They know what a cash flow plan is.

CONTENT: During this session, the trainer demonstrates the process of budgeting and financial planning for a year and participants make an exercise, they fill budget templates on their own notebooks.

- **METHOD:** Presentation and individual exercise with tutorial
- **METHOD DESCRIPTION**:

  Trainer explains the difference between a budget and a financial plan.

A **budget** is an estimate of income and expenditure for a set period of time. In a viable business, income needs to cover expenditure. The budget sets the amount that is planned to be spent (expenses) and received (incomes) on any particular item over a certain period, while **the financial plan** looks at the flow of money in and out of the business over a certain period. It can be adjusted as real the spending becomes known. Don't confuse budget with cash flow and income with profit. A cash flow plan is essential to highlight if the business is at risk of running out of money. Expenditure should cover the full cost of farm operation (production costs and farm expenses) for the year (wages, seeds, inputs, company administration).

Main elements are common, the main differences are explained during the exercise.

<u>Main elements with different aspects:</u>

1. Expenditure

   Personnel cost

   Direct cost

   Indirect cost

2. Revenue
3. Investment
4. Contingency

Trainer shares templates, and screens the budget table.

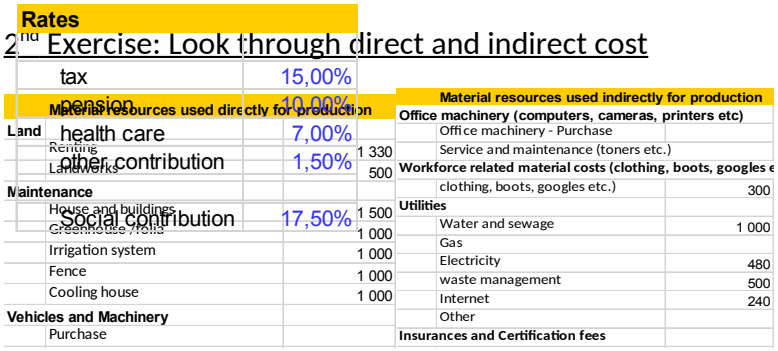
<u>1st exercise: Calculation of personnel cost</u>

Trainer shows 'the Business Plan' sheet, and highlights part of 'Personnel cost'

Personnel cost							
	name	**A**	name	**B**	name	**C**	
	months	**12**	months	**12**	months	**6**	
	monthly	annual	monthly	annual	monthly	annual	**Total**
Net salary	798	9 576	831	9 975	865	5 187	
tax	180	2 160	188	2 250	195	1 170	
pension	120	1 440	125	1 500	130	780	
health care	84	1 008	88	1 050	91	546	
other contribution	18	216	19	225	20	117	
Salary	1 200	14 400	1 250	15 000	1 300	7 800	**37 200**
Social contribution	210	2 520	219	2 625	228	1 365	**6 510**
Other allowance (eg. cafeteria)	50	600	50	600	50	300	**1 500**

Trainer explains the terms salary, net salary and total cost of employment. The sheet helps to calculate salary and cost of every staff member in various aspects (monthly-annual, individually and in total as well). During the exercise, participants develop their own sheet from a template. Cells with blue numbers can be modified based on individual needs. Learners can make multiple plans to see various real examples of

costs. There is a supporting table with tax rates to the right of the calculations, **this table should be harmonized with national categories and numbers.**



Rates	
tax	15,00%
pension	10,00%
health care	7,00%
other contribution	1,50%
Social contribution	17,50%

Material resources used directly for production	
Land	
Renting	1 330
Landworks	500
Maintenance	
House and buildings	1 500
Greenhouse / Rolls	1 000
Irrigation system	1 000
Fence	1 000
Cooling house	1 000
Vehicles and Machinery	
Purchase	

Material resources used indirectly for production	
Office machinery (computers, cameras, printers etc)	
Office machinery - Purchase	
Service and maintenance (toners etc.)	
Workforce related material costs (clothing, boots, googles e	
clothing, boots, googles etc.)	300
Utilities	
Water and sewage	1 000
Gas	
Electricity	480
waste management	500
Internet	240
Other	
Insurances and Certification fees	

2nd Exercise: Look through direct and indirect cost

Trainer explains terms:

- **direct costs** are material resources used directly for production (eg. raw materials, tools, energy)
- **indirect cost** are material resources used indirectly for production (eg. office, marketing, trainings)

In the templates several cost categories are listed, the trainer and participants look through these together. Trainer can ask participants to add other cost items or make other categories. Amounts and numbers can also be discussed, but the trainer should emphasize that numbers are based on specific business circumstances, every similar CSAs has different numbers. During the exercise, participants elaborate on their own tailor-made cost structure. Trainer starts a discussion on how participants can get their numbers (eg. raw estimation, instinct, estimation based on previous business years, calculation or from other farmers). Trainer highlights that calculation should be based mainly on the calculation of previous years, which is an easy task if the farmer has a good financial system.

3rd exercise: Investment

We can call **investment** all of those expenditures which repeat over multiple years – e.g. MOT for cars which should be done every two years or building of a polytunnel.

Depreciation is an accounting process by which a CSA allocates a tangible asset's cost over the duration of its useful life. In other words, it records how the value of an asset declines over time. Each time a company prepares its financial statements, it records a depreciation expense to allocate a portion of the cost of the buildings, machines or equipment it has purchased to the current fiscal year. The purpose of recording depreciation as an expense is to spread the initial price of the asset over its useful life.

Depending on their own preferences, CSAs are free to choose from several methods to calculate the depreciation expense. To keep things simple, the trainer can suggest one method for CSAs.

This takes an estimated scrap value of the asset at the end of its life and subtracts it from its original cost. This result is then divided by the estimated number of useful years of the asset. The company's expense is this amount of depreciation each year. Here is the formula for the straight-line method:

Straight line depreciation = (original costs of asset – scrap value)/estimated asset lifetime

Assets	price	number of usage's years	scrap value	yearly depreciation
Tractor	30 000	15	3 600	1 760
House and buildings	100 000	20	60 000	2 000
Greenhouse /folia	12 500	5	-	2 500
Irrigation system	3 500	7	-	500
Fence	5 000	10	-	500
Cooling house	20 000	20	10 000	500

Example:

- Bought a tractor in 2015 for 30.000 EUR,
- estimated lifetime: 15 years,
- scrap value in the end of 15th year: 3600 EUR
- depreciation: (30.000 EUR -3600 EUR)/15 year = 1760 EUR / year
- So in 2015' budget: expense (spending) = 30.000 EUR, cost (value in the budget) = 1760 EUR;
- in 2019's budget: expense= 0 EUR, cost = 1760 EUR,

It is possible that the cost of the tractor can be shared among the CSA members for those 15 years (2015-2029), the biggest challenge is to finance all the expenses in 2015 (loans, funding, extra payments etc.).

Participants make some calculations (estimation of scrap value can be tricky, trainer should avoid long discussion, keep focus on calculation, numbers can be fictive).

These categories make the real difference between budget and financial plan. In the budget of 2015, the tractor appears as 1760 EUR. But in the financial plan, the farmer must spend 30.000 EUR. It is the same logic with **reserves** and **contingency** (budget item for unforeseen costs, like in risk assessment).

4th exercise: Revenues

Trainer explains a regular method of the “pricing” of a CSA share:

- divide total expense by total number of shares (make 3-5 options)
- divide shares into various sizes and qualities
- divide into spring/fall and summer share if it makes sense
- define frequency of payments

Trainer makes groups of 3-4 participants. Each participant summarizes to others, in 3-5 sentences, how they calculate the price of their share. Let them discuss 10 minutes, then ask them to share their findings. Trainers should encourage the discussion of further topics:

- did you distribute the real costs of the CSA amongst the members?
- how many types of shares did you include? how long is the season?
- did you define the share based on your real costs? If not, why?
- are you benchmarking off of other CSA farmers? Did you use the market price or another price? If yes, are you benchmarking production/share also? How many (kind of) products do you provide? (e.g.: market prices, wholesale market, farmers market price, average weight of the production, unit pricing)
- how did you define the optimal number of members regarding physical possibilities (land, etc.) and financial issues?
- “half share costs more than half of the share”: do you know the fix cost of a share no matter what size it is?
- which case is better? if you have a few large shares or a lot of small ones?
- did you add non food items to the share?
- do you make processed food?

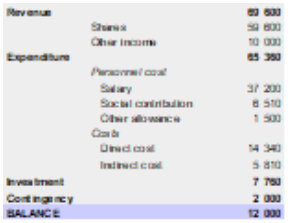
- are you diversifying prices based on delivery points/distribution channels? If so, how?

Ask participants to list their other types of incomes (family allowance, loan, funding, support, donation, business activities etc.)

Final numbers (number of shares, prices, other incomes) are added to the Revenue part of the budget table (participants can place the numbers in their sheet as well).

Incomes from shares and other activities							
Type of share	small			big			**total**
periond in advance	10 months	3 months	monthly	10 months	3 months	monthly	
rate	660	220	66	1 000	333	100	
frequency	1	3	10	1	3	10	
yearly rate	660	660	660	1 000	1 000	1 000	
number of members	10	5	45	1	4	15	**80**
	6 600	3 300	29 700	1 000	4 000	15 000	**59 600**
Other income (crops)	10 000						**10 000**

At the bottom of the table, participants see the balance of their revenues and expenditure. If this number is negative, the budget must be overseen and some business or financial decision (eg. get more customers, find a cheaper supplier) have to be made.



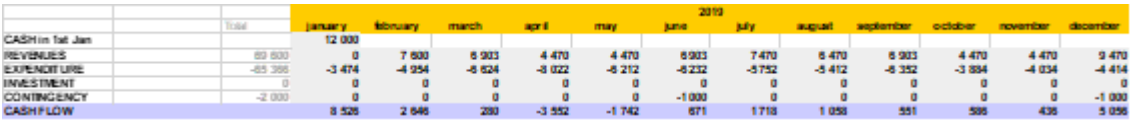
Revenue	**69 600**
Shares	59 600
Other income	10 000
Expenditure	**65 350**
Personnel cost	
Salary	37 200
Social contribution	8 510
Other allowance	1 500
Costs	
Direct cost	14 340
Indirect cost	5 810
Investment	**7 750**
Contingency	**2 000**
BALANCE	**12 000**

Trainer closes the budget part of the discussion and shows the sheet for the **financial plan** and explains that. The financial plan looks at the flow of money in and out of the business over a certain time, mostly month by month (but it can also be personalized). This sheet is connected with the budget sheet, but monthly divisions are made by users. The first number of this table is the cash balance on the first day (how much money the user has in their cashier/bank account).

		2019											
	Total	january	february	march	april	may	june	july	august	september	october	november	december
CASH in 1st Jan		**12 000**											
REVENUES	69 600	**0**	**7 600**	**6 903**	**4 470**	**4 470**	**6 903**	**7 470**	**6 470**	**6 903**	**4 470**	**4 470**	**9 470**
Shares	0												
Big	1 000		1 000										
	4 000			1 333			1 333			1 333			
	15 000			1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500	1 500
Small	6 600		6 600										
	3 300			1 100			1 100			1 100			
	29 700			2 970	2 970	2 970	2 970	2 970	2 970	2 970	2 970	2 970	2 970
Other income	10 000							3 000	2 000				5000
EXPENDITURE	-65 366	**-3 474**	**-4 954**	**-6 624**	**-8 022**	**-6 212**	**-6 232**	**-5 752**	**-5 412**	**-6 352**	**-3 884**	**-4 034**	**-4 414**
Personnel cost	0												
Salary	14 400	1 200	1 200	1 200	1 200	1 200	1 200	1 200	1 200	1 200	1 200	1 200	1 200
	15 000	1 250	1 250	1 250	1 250	1 250	1 250	1 250	1 250	1 250	1 250	1 250	1 250
	7 800				1 300	1 300	1 300	1 300	1 300	1 300			
Social Contribution	2 520	210	210	210	210	210	210	210	210	210	210	210	210
	2 625	219	219	219	219	219	219	219	219	219	219	219	219
	1 365				228	228	228	228	228	228			

At the bottom of the table, participants see the balance of income and spending of a certain time period. If the user sees a negative number, the timing must be revised,

and some intervention (eg. loan, ask advanced payment, postpone activities etc.) are needed.



		Total	2019 january	february	march	april	may	june	july	august	september	october	november	december
CASH in 1st Jan			12 000											
REVENUES		89 800	0	7 800	6 903	4 470	4 470	6 903	7 470	6 470	6 903	4 470	4 470	9 470
EXPENDITURE		-85 386	-3 474	-4 254	-6 824	-8 022	-6 212	-6 232	-5 752	-5 412	-6 352	-3 884	-4 034	-4 414
INVESTMENT		0	0	0	0	0	0	0	0	0	0	0	0	0
CONTINGENCY		-2 000	0	0	0	0	0	-1 000	0	0	0	0	0	-1 000
CASH FLOW			8 526	2 646	280	-3 552	-1 742	671	1 718	1 058	551	586	436	5 056

Trainer ensures time for questions and answers, but pays attention to keep the discussion within limits. There are several books and courses to explain this knowledge, even for small scale farmers Additionally, there are many online tools, which are an easily accessible way to find help. These tools will be presented in Module 3.

- **TOOLS:** Excel sheets of Budget and financial planning with numbers, excel template for participants, laptops for participants, PPT slide 21
- **DURATION:** 200 min (with breaks)
- **RESOURCES:** Solid Base Research & Portfolio, 2018

Part 4: Closure

CONCLUSION

- **TARGET AND SKILLS:** The aim of this session is to summarize the learning process of the day and evaluate the training. Participants understand the connectivity between modules.
- **CONTENT**: Collecting feedback from the participants on how they evaluate the day, and what they still need after the training.
- **METHOD**: Plenary sharing, feedbacks
- **METHOD DESCRIPTION**: The trainer asks each participant to answer these questions: How do you evaluate this day? How did you feel about yourself? What did you like the most and what would you change in your CSA? Big roundtable discussion, and collecting any additional ideas also on a flipchart. Trainer ensures that each participant gives feedback.

After the activity, adult participants are asked to fill in an anonymous questionnaire on the training events (content, performance of trainers or presenters, atmosphere etc.)

- **TOOLS**: Questionnaires

- **DURATION:** 30 min, based also on the number of participants
- **RESOURCES:**

MODULE 3 – Digital skill sharing

Introduction

The third module of the "Solid Base" project is about digital skill sharing to enable CSA coordinators to consciously choose and use software. No CSA is possible without the usage of modern means of communication. A broad variety of tools have emerged that have been custom made for CSA's. Several flavors of CSA emerged throughout Europe, and each tool fits one of these best. For small or starting CSA's, however, these specialized tools can be unnecessarily complex and simple tools are often very effective.

We want to shed some light on the possibilities that existed at the time of research. This module will also create some space for experience exchange of the participants on what tools they are using to achieve different tasks, and how much success they have experienced with each.

As an example of a CSA management tool, a hands on session with OpenOlitor will be conducted.

Special attention will be put on the SolidBase app, which was developed during the namesake project. With it, complex budgets of CSAs can be broken down into small visual groups and displayed with explanatory texts. The potential members can thereby gain enhanced insight into the financial necessities of the farm.

Target group

The target group of the training are participants who are either coordinators of CSA initiatives already in operation, engaged members with interest in IT, as well as farmers who may have experience with being involved in a CSA already, or are planning to become more involved at the coordination tier. Newcomers who want to get acquainted with the topic for the first time are also very welcome.

Prerequisites

It is assumed that most participants will be people already involved in a CSA initiative, such as coordinators and active members who want to repeat or deepen their knowledge of CSA management. It is expected that participants are active CSA members with their own role in CSA management, or people who want to participate more in CSA coordination. Some basic digital skills are desirable, but not absolutely necessary to participate. This includes

fundamental understanding of how a computer works: What an operating system is, what files and filesystems are, what applications are and how to install them, basic insight into the functionality of the internet and online applications.

The participants should bring a laptop with them. Smaller mobile devices (tablets / smart phones) are not suitable for working professionally with data. Alternatively, a computer room can also be used for the workshop. A good internet connection and wifi is required.

For some sessions, a moderation toolkit is useful to collect ideas physically. However, this can also be done using a digital version like a simultaneously editable online notepad (etherpad).

The aims of the module

This module wants to enable the participants to consciously choose between the diverse offerings of software solutions for CSA management. This requires some knowledge about software production and the accompanying philosophies. By completing this module, participants understand why it makes sense for an initiative of the solidarity economy movement to use free software. Additionally, they will understand why to host their online data service at kindred initiatives out of the libre hoster movement, another facet of the solidarity economy. The participant will get an introduction to the topic to raise their awareness of it and spark further examination of this field.

Participants will gain knowledge of the existence of the tools suitable for managing their specific strand of CSA, and gain detailed insight into the possibilities of OpenOlitor as one example.

Detailed understanding of the functionalities the SolidBase app provides will also be trained. Its concepts for storing the user data (SoLiD – Socially Linked Data) will provide an example of what it means to “redecentralize the internet,” a concept that digital rights activists are currently demanding in countering the monopolies of well known information corporations.

Practical digital skills of all levels will be trained during the hands on sessions by interacting with the trainers and the other participants.

Main topics

- Listing and discussion of digital tools used by the participants
- Presentation of the tools found during the solid base research
- Introduction of the Free and Libre Software movement
- Hands on sessions on OpenOlitor, SolidBase app and general online communication and collaboration tools

Facilitation and training principles

The module is supported by slides, the solid base booklet and additional online resources. The idea is to have one part of presentation and one part of self analysis and group activities. Given the links to the online resources, learning can be continued after the workshop has finished.

The content of this module aims to provide a broad overview of existing tools in the Free Software universe. It is essential that a trainer is present who is familiar with its basic concepts, and has gained general knowledge of the existing tools for SFS management by testing them. Thorough knowledge is needed for OpenOlitor, the SolidBase app and for communication and collaboration tools. As the group will split up for one session, it is recommended to have at least three trainers on spot, one for each tool (group).

Module detailed content and methodology

Part 1: Introduction and welcoming

Introduction of participants

- **TARGET AND SKILLS**: Participants feel more relaxed in the group if they know each other´s names, ideas and background, and the trainers could also easily monitor what the main focuses and interests of the participants are.
- **CONTENT**: Self - presentation of participants, identifying their experiences, motivations, wishes, interests and expectations
- **METHOD**: Roundtable discussion
- **METHOD DESCRIPTION:**

  Round of introduction answering the questions
  - Who are you?
  - What is your CSA?
  - What role do you have in your CSA?
  - What do you expect from today?
- **DURATION**: 15 minutes = 15 participants (it depends on the number of participants)
- **OPTIONS:** If the group of participants is very big and an extensive introduction round would be too time consuming, the introduction (a.) can also be conducted using pairing: Start with a quick round of introduction only answering the questions
  - What is your name?
  - What is your CSA?

Continue with one round of pairing with a neighbour. Each participant asks the following questions to their partner and writes the answer on a note:

- Who are you?
- What is your CSA?
- What role do you have in your CSA?
- What do you expect from the day?

Everyone hangs the notes about them on a wall. Participants can explore the notes during a break and start conversations with their peers.

- **RESOURCES:** https://cloud.solawi.allmende.io/f/55816

About Solid Base

- **TARGET AND SKILLS:** Participants are familiar with the content of the training, and are aware of the fact that this event is the third part of 4 modules. They also know about the available training materials and tools to help them in managing a CSA. It is explained to them that this is the testing phase of the educational program, their evaluation and feedback is necessary in order to finalize the intellectual outputs of the project.
- **CONTENT:** Description of the whole training program and structure of the modules. Time frame of Module 3.
- **METHOD:** Presentation
- **METHOD DESCRIPTION:** Trainer presents program content and time frame of M3, and briefly introduces other modules.
- **TOOLS:** projector, slides
- **DURATION:** 10 minutes
- **RESOURCES:** Solid Base module 3 training plan, slides

Positioning exercise

- **TARGET AND SKILLS:** This part intends to find out more about the group structure and knowledge on a mutual basis. It helps to adjust the workshop towards the needs of the participants. The participants will get to know each other better, which helps to find fitting partners for mutual skill sharing.
- **CONTENT:** The participants are asked questions and shall position themselves on an imaginary line across the room.
- **METHOD:** Positioning exercise

- **METHOD DESCRIPTION**: To get a feeling of the groups experience on ICT tools and FLOSS, we conduct a positioning exercise with the following questions
    - How much have you been exposed to CSA information and communication technology?
    - How comfortable are you with the usage?
    - How much focus do you have on data sovereignty?
    - How much is the usage of Free and Libre Open Source Software discussed in your CSA?
- Ask the participants if they have additional questions.
- **DURATION**: 15 minutes

Part 2: Status Quo: Tools and criteria

1 **Collection of participants needs for tools**

- **TARGET AND SKILLS**: Participants will get the opportunity to learn from each other, what tools are currently used, and how. They will get practical inspiration based on how other initiatives are organized digitally.
- **CONTENT**: Participants are encouraged to share the tools they use, why and how they chose them and their experience with them. The exercise of tool collection will be an active exchange of knowledge and experiences. It is a good starting point to understand the status of participants IT usage, tool satisfaction and problems they face. The exchange is intended to connect participants who use the same tool, or who want to switch between tools to learn from each other even after the workshop has ended.
- **METHOD**: World Café
- **METHOD DESCRIPTION**: We collect the pains and needs of the participants. The participants are split into 3 tables. On each table there is a host who stays at the same table the whole time and collects the input from the participants on a large flip chart paper. All participants rotate through the tables every 7 minutes. The tables are:
    - Tools we use and what we use them for
    - Our experience with the tools: Limitations, Options to improve, Wishes
    - How do we select tools for our initiative: Process, criteria, implementation?

  After the 3 rounds, the table hosts will present a summary of the results to the whole group. The moderators will open space for discussion of the findings.

- **TOOLS:** Flipchart paper, chart markers, tape
- **DURATION:** 30 minutes

Introduction to FLOSS

- **TARGET AND SKILLS:** The goal of this session is to present Free and Libre Open Source Software (FLOSS) principles as criteria for software selection. Takeaways from FLOSS the presentation are:
    - FLOSS stands for Free and Libre Open Source Software. “Free software” is a matter of freedom, not price. To understand the concept, you should think of “free” as in “free speech,” not as in “free beer”. The “Libre” stands for the ability to modify the code, not only to watch a cleaned version of it. For the sake of simplicity these notions are often used synonymously, so most often if people talk about OpenSource or Free Software they are referring to FLOSS.
    - Free software is a matter of the users’ freedom to run, copy, distribute, study, change and improve the software. It gives control to the user.
    - Non-free programs control the users, and the developer controls the program; this makes the program an instrument of unjust power. (https://www.gnu.org/philosophy/free-sw.en.html)
    - FLOSS Software prevents vendor lock in, enables data federation, interoperability and creation of open standards, distribution and free management of identity and privacy.
    - Why does it matter to SFS movement: Common values of community, participation, collaboration, democracy and user empowerment.
- **CONTENT:**

    Sustainable digitization

    SFS initiatives aim to transform the food system towards an economy that not only gives access to healthy food, but also nurtures the ecological and social environment. This aim is equally important when looking at technology and digitization. Can digitization be sustainable? Hardware that uses conflict metals, supports the throwaway culture for electrical devices and monopolies that own huge amounts of data might not be the future. Techies and Environmentalists that gathered during Bits’n’Bäume, the first such conference in Germany, formulated demands for a socio - ecological digitization under the following guidelines: Social-ecological objectives in the design of digitization, democracy, data protection and control of monopolies,

education, aspects of development and trade policy, IT security, longevity of software and hardware. https://bits-und-baeume.org/forderungen/en
The last topic on longevity suggests open source software as one practical example. The following chapter will shed more light on the topic of FLOSS and why it is important to be considered and discussed in the SFS movement.

What is FLOSS and where does it come from?
FLOSS stands for Free and Libre Open Source Software. The Free Software Movement was initiated in the 1980's and was pursued by the Free Software Foundation. It was a reaction to the growing importance of computer technology and software. The predominant way of writing software during that time was so called proprietary software, which frustrated developers who wanted to collaborate on software and keep control over their devices. As opposed to proprietary software, where the source code was kept secret, the Free Software Foundation was established to promote software that is open to use, study, modify and improve. Its founder, Richard Stallman, describes that the "'free' in our name does not refer to price; it refers to freedom" https://www.gnu.org/bulletins/bull1.txt.
"Free software" means software that respects users' freedom and community. A saying emerged that when you think of Free Software you should think of free as in free speech, not as in free beer. Four freedoms were defined, which a Free Software needed to fulfill in order to be fully classified as "free". The freedom to run the program as you wish, to study and make changes, to distribute and to contribute to the community. They are called the four essential freedoms.

The four essential freedoms of software
As stated on the GNU homepage, "A program is Free Software if you, the user, have the four essential freedoms:

- Freedom 0 is the freedom to run the program as you wish.
- Freedom 1 is the freedom to study the source code and then change it to make the program do what you wish.
- Freedom 2 is the freedom to help your neighbour – that's the freedom to make and distribute exact copies of the program to others, when you wish.
- Freedom 3 is the freedom to contribute to your community: that's the freedom to distribute copies of your modified versions, when you wish.

With these freedoms the users have control over the program. When users don't control the program, we call it a "non-free" or "proprietary" program. The non-free program controls the users, and the developer controls the program; this makes the program an instrument of unjust power. " https://www.gnu.org/philosophy/free-sw.en.html

Licensing

How can we ensure that Free Software is truly free and continues to be? To protect the rights of authors and creators of software, it is protected by the laws of copyright. While the law was designed to ensure that proprietary software developers can make sure that distributing copies of their software is illegal, copyright laws also ensure that free software licenses can be implemented. Within his GNU Project – the first FLOSS operation system was initiated by Richard Stallman and completed as GNU/Linux - Richard Stallman coined the concept of "copyleft" to prevent the program from being turned into proprietary software. It reverses the concept of copyright as it gives permission to run, copy, modify and improve the program, but denies permission to add restrictions. Furthermore, the concept of "public domain" exists. Everything in the public domain belongs to the public, thus no copyright applies.

Why not Open Source ?

FLOSS means Free and Libre Open Source Software, however there are several names for similar concepts that sometimes are used interchangeably. Open Source Software, for example, was formed in the 90's. The idea was to clarify the concept of Free Software, which was sometimes confused with "Freeware" – Software that is given at no cost. As mentioned above, the "free" in free software relates to freedom, not to price. There is an ongoing discussion if freedom or openness is more important, however, to be free, the code must be open! Another perspective on the emergence of the terminology "Open Source" is that the initiators wanted the concept of "Free Software" to be more accessible and less ideologic. In theory, Open Source focuses more on the practical benefits of collaborative software and tends to take a more pragmatic, business-case perspective. While the intrinsic motivation of the two camps differs, the practical reality shows their common approach. Looking at the licenses that are approved by the FSF as well as the OSI, they mostly overlap. Hence, most Open Source Software is indeed Free Software. The term FLOSS describes the concept without preferring one philosophical idea over the other.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainer explains principles of Free and Libre Open Source Software (FLOSS)
- **TOOLS**: projector, slides
- **DURATION**: 15 minutes
- **RESOURCES**:

- General presentation of Solid Base: https://cloud.solawi.allmende.io/f/55816
- Presentation of FLOSS in the context of Solid Base: https://hack.allmende.io/p/solidbase-floss#/
- Article on the relation of Free Software and Degrowth: https://www.degrowth.info/en/dim/degrowth-in-movements/free-software-movement/
- Postition paper for sustainable digitization: https://bits-und-baeume.org/forderungen/en

Exchange and discussion

- **TARGET AND SKILLS**: Participants get the opportunity to ask questions and learn from each other
- **CONTENT**: Participants get the opportunity to ask questions and learn from each other
- **METHOD**: Open discussion
- **METHOD DESCRIPTION**: Trainer asks for questions and remarks and lets the group answer them
- **DURATION**: 10 minutes

Part 3: Recommendation of practical tools – Ecosystem and selection

Presentation of Solid Base research on existing dedicated SFS management tools

- **TARGET AND SKILLS**:Participants will gain a broad understanding and overview of the constantly evolving ecosystem of available SFS-specific management software.
- **CONTENT**: The Solid Base tool review has been conducted as part of the project. The aim of the review has been to research and identify software that suitably meets the needs of SFS.
  The most important tools will be quickly presented and their originating network will be named. Detailed knowledge of the participants on differences of the european SFS strands, that could be acquired during M1, is desired but not necessarily required.
  For CSA management these are:

Tool	**Originating network / CSA / Organisation**
OpenOlitor	Soliterre - Regionale VertragsLandwirtschaft (RVL) Bern
Juntagrico	Swiss Solawi Network / Ortoloco - Zurich
ACP-Admin	Fédération Romande d'Agriculture Contractuelle de Proximité (FRACP) /

	Rage de Vert - Neuchâtel
Cagette.net	AMAP – Alilo - Bordeaux
AmapJ.fr	AMAP – Drôme
Unique drupal based solutions	Netzwerk Solawi – Gartenkoop Freiburg, Karoffelkombinat Munich, Solawi Marburg

For Foodcoop / buying group management these are:

Tool	**Originating network / Organisation**
OpenFoodNetwork	OpenFoodNetwork – Australia
FoodSoft	FC Schinke 09 – Berlin Kreuzberg
FoodCoopShop	Mario Rothauer - Austria

- **METHOD**: Presentation
- **METHOD DESCRIPTION**:
  - The trainer sums up the comprehensive presentation on FLOSS software suitable for SFS management
- **TOOLS**: projector, slides
- **DURATION**: 15 minutes
- **RESOURCES**:
  - Comprehensive presentation (takes ~1,5h to explain everything in detail) : https://slides.solidbase.info/slides.md#/
  - A summary of the findings in text form: https://solidbase.info/recommendations/
  - A detailed work in German on foodcoop tools by Johannes Winter (2019):https://cloud.solawi.allmende.io/s/542jf92CwGfbz5E

The SolidBase app

- **TARGET AND SKILLS**: Participants will get a first practical insight into the SolidBase app, and will get to know the most important URLs to find an entry for learning
- **CONTENT**:

  The SolidBase application is an **educational tool** for budget planning and presentation. It was developed to help build accounting capacities for coordinators of

initiatives active in Solidarity based Food Systems (SFS), but is usable for all sorts of solidarity and social economy enterprises.
This application provides a structure for projecting and visualizing the annual and monthly **costs** of an SFS. All costs can be assigned to a cost category, each of which is linked to an explanatory text. The resulting overview is intended to provide a realistic picture of all costs involved in truly sustainable food production; and thus, increase the willingness of (potential) members to contribute an adequate amount of money. The budget makes it possible to clearly communicate all costs involved in agro-ecological cultivation methods, community building and other socially or ecologically valuable processes that take place in SFS.
The explanatory texts can also be used to help educate SFS coordinators as to relevant cost categories, so as not to forget any costs when creating a budget.
The concept of nested **activities** is used to facilitate the structuring of the whole farm into logical units. These can be business branches (farming, gardening, bakery), marketing channels (what is produced for CSA, what not?) or even production procedures (one bed of carrots, the monthly costs of a cow).
The possibility to compare one's business budget with predefined **example budgets** helps new initiatives remember all necessary costs, and to build a more realistic budget for their own businesses.
SolidBase stores your data on SoLiD. In order to use the app, you need to register at a public SoLiD server. SoLiD is a technology for “redecentralizing” the web. It allows for storing your data apart from the app. This makes monopolization of the data impossible, and simultaneously allows you to define access rights very specifically.

Keep in mind, the SolidBase app is neither capable of doing full accounting, nor monitoring an SFS’ finances (yet). For a fully fledged bookkeeping solution, only GnuCash is available from the FLOSS universe. In part 5 this can be looked at in more detail.

- **METHOD**: Live demo.
- **METHOD DESCRIPTION**: The trainer opens the app in the browser and presents an example budget (in the local language). Basic concepts of the app are explained.
- **TOOLS**: projector, SolidBase app, example budget in local language
- **DURATION**: 30 minutes
- **RESOURCES**:
  - solidbase.info
  - app.solidbase.info

- https://learn.solidbase.info/en/solidbase/
- https://solid.inrupt.com/how-it-works

Management tool example: OpenOlitor

- **TARGET AND SKILLS**: Participants will get a first practical insight into OpenOlitor and will get to know the most important URLs to find an entry for learning
- **CONTENT**:OpenOlitor is a web-based, multilingual platform facilitating the setup of a community supported agriculture (CSA) platform, linking producers and consumers. OpenOlitor is published under the AGPL v3 licence and includes functionalities matching the needs of CSA initiatives, such as membership management, delivery planning, payment tracking and reports. In addition to the administration portal, a member portal allows members to access information on their membership and register for work days on the farm. OpenOlitor was initiated in 2015 in Bern, Switzerland, and was co-funded by the federal ministry of agriculture. The association "OpenOlitor" was formed, which oversees the maintenance of the code and the documentation. There is a growing international community for OpenOlitor. The initiative "sunu" in Germany has added functionalities like SEPA payment to further internationalize the software. OpenOlitor is just one tool among a constantly developing ecosystem of tools. It has been chosen for this training guide as an example of a specialized CSA software.
- **METHOD**: Presentation in combination with Live demo.
- **METHOD DESCRIPTION**: Background, intention and functionality of OpenOlitor are shortly presented in the app. Some predefined processes can be shown during a short live demo.
- **TOOLS**: projector
- **DURATION**: 15 minutes
- **RESOURCES**:
  - http://openolitor.org
  - https://learn.solidbase.info/en/openolitor/

Introduction to solutions for communication and collaboration

TARGET AND SKILLS:Participants will get a practical insight into FLOSS Communication and Collaboration tools, and will get to know the most important URLs to find an entry for learning

CONTENT:

Collaboration

With collaboration tools we mean online tools that allow simultaneous workflow without being in the same place. The concept of the "paperless office" comes to mind, where everything is stored digitally and accessible for all team members. We need collaboration tools to share files, simultaneously work on documents, share calendar, contacts and to take notes. The selection of tools includes

Nextcloud: for file sharing, calendars and contacts
OnlyOffice: shared document editing
Etherpad & CodiMD: notes

Communication:

Communication is the most common reason to use IT tools. Initiatives differentiate between the internal communication among working groups and members and external communication. Existing tools can be roughly divided into "one-to-many" and "many-to-many". The "one-to-many" communication is a one-sided communication, where information is intended to be passed and not necessarily discussed. These include websites, blogs, newsletters and, to some extent, social media. "Many-to-many" tools allow a more dynamic communication. It includes Chat/Messenger, E-mails, Mailing lists, Forums, Wikis, Group calls, Social Media and Content Management Systems (CMS) for websites. Refer to the Solid Base recommendations text for details

METHOD: Presentation

METHOD DESCRIPTION: The trainer gives a short introduction into some recommended communication and collaboration tools

TOOLS: projector, slides

DURATION: 30 minutes

RESOURCES:

https://hack.allmende.io/solidbase-collaboration
https://solidbase.info/recommendations/#communication

Part 4: Hands- on experience and user testing of SolidBase app

Set up SoLiD account

TARGET: Participants will have a SoLiD account and be able to access the SolidBase app

CONTENT: In order to use the SolidBase App, users need to create a SoLiD account. This will be done in this session to ensure everyone has access.

METHOD: Demonstration and self-implementation

METHOD DESCRIPTION: The Facilitator will show the process of creating an account and participants will follow the steps.

TOOLS: individual Laptops, WIFI connection, project

DURATION: 5 minutes

RESOURCES:

https://learn.solidbase.info/en/solidbase/task-1/

Exercises

TARGET: The participants will get to know the functionality of the SolidBase App. They will learn about the example budget and sharing facility of the tool. Furthermore, participants will give feedback on their experience and discuss opportunities to improve the tool further.

CONTENT: The participants will get familiar with the tool and learn how to set up, edit and share a budget. This hands on experience will give participants the opportunity to experiment and test the tool in a safe environment with guidance from experts.

METHOD: Hands on experience through exercises and live testing .

METHOD DESCRIPTION: Exercises are prepared for the respective tools and worked through by the participants. Participants sit together in groups of 2-3 people and work through exercises. They will have the exercise and supporting documentation on how to complete the exercise. The trainers will give guidance and answer questions that arise. Participants are encouraged to work through the exercises at their individual pace. The trainer will, however, work through the exercises as well, which is displayed on the projector and gives the participants additional guidance.

TOOLS: One computer per person, good internet connection/WIFI, projector

DURATION: 60 minutes

RESOURCES:

https://learn.solidbase.info/en/solidbase/

Feedback and discussion

TARGET: Organizers of the event take feedback from participants on the functionality of the app, and discuss possible use cases and improvements.

CONTENT: Evaluation of the app including discussion on collected feedback from the exercise session.

METHOD: Open discussion

METHOD DESCRIPTION: Participants will share their view and ideas on the app. One round is done for each participant to contribute. Input is collected on a pad or flipchart.

TOOLS: Flip chart (not absolutely necessary)

DURATION: 10 minutes

Part 5: Hands- on experiences with CSA administration, bookkeeping, communication and collaboration tools

Examples

- **TARGET AND SKILLS:** The participants will get comfortable with using the respective tools by working through exercises or by free trial guided by experts. Participants will

be able to ask questions, and explore if and how the tools can support them in their daily administration and communication.

- **CONTENT:**

The participants will get familiar with the tools and learn simple processes. The extensive amount of hands on experience will give participants the opportunity to experiment and test the tools in a safe environment with guidance from experts. In the second block, the participants can choose from a selection of tools to gain practical experience on. The tools to choose from were introduced in part 3, and participants should be comfortable selecting the option most interesting for them.

CSA administration

As an example for CSA administration tools, we take a thorough look at OpenOlitor here.

Communication / Collaboration tool experiences (Optional)

This category is huge. This is the main use of IT in civil society. Which tools to concentrate on depends on the knowledge of the trainers and the interests of the participants. The current global top runners are:

Messengers: Matrix
Forum: Discourse
Social Media: Fediverse
Collaboration: Nextcloud

Accounting: GnuCash introduction (Optional)

GnuCash is a personal and small-business financial-accounting software. It is a desktop program that is freely licensed under the GNU GPL. On its website it is described as follows:
'*Designed to be easy to use, yet powerful and flexible, GnuCash allows you to track bank accounts, stocks, income and expenses. As quick and intuitive to use as a checkbook register, it is based on professional accounting principles to ensure balanced books and accurate reports.*" GnuCash is the only fully fledged FLOSS accounting software, that's suitable for an international community, that we could identify during the project. It is widely used and has an evolving and longstanding community of supporters, users and engineers. Extensive documentation exists.
Despite these facts, double entry bookkeeping in itself is not easy to understand and GnuCash still contains some pitfalls. An experienced trainer is needed for adequate assistance here.

- **METHOD**: Hands on experience through exercises and live testing .

- **METHOD DESCRIPTION:**

If multiple trainers for the optional content blocks could be acquired, the group splits up. The more trainers, the more learning groups can be set up. The best option would be peer2peer experience exchange of the participants.
For **OpenOlitor**, exercises have been prepared and should be worked through by the participants. Participants sit together in groups of 2-3 people and work through

exercises. They will have the exercise and supporting documentation on how to complete the exercise. The trainers will give guidance and answer questions that arise. Participants are encouraged to work through the exercises at their individual pace. The trainer will, however, work through the exercises as well, which is displayed on the projector and gives the participants additional guidance.
For the **optional content blocks** the group will try out the tools freely, instructed by the trainer. For the **communication/collaboration** tools, a choice should be made on what to concentrate on during the first 15 minutes.

- **TOOLS**: One computer per person, good internet connection/WIFI, projector
- **DURATION**: 75 minutes
- **RESOURCES**:
    - Solid Base booklet
    - OpenOlitor
        - https://learn.solidbase.info/en/openolitor/
        - https://openolitor.org/
    - Communication
        - https://solidbase.info/recommendations/#communication
        - Matrix
            - Why Matrix is the most interesting messaging solution today Bitleaf - Sustainable IT Solutions: https://bitleaf.de/2018/10/16/why-matrix-is-the-most-interesting-messaging-solution-today/
            - Matrix introduction: https://matrix.org/docs/guides/introduction/
        - Discourse
            - Why it's just the best forum: https://www.slant.co/topics/898/~best-web-forum-software-packages
            - Discourse new users guide: https://meta.discourse.org/t/discourse-new-user-guide/96331
        - Fediverse
            - What's that? http://en.wikipedia.org/wiki/Fediverse
    - Collaboration
        - https://hack.allmende.io/solidbase-collaboration

        - Nextcloud
            - https://nextcloud.com/
            - https://nextcloud.com/talk/
            - https://nextcloud.com/collaboraonline/ / https://nextcloud.com/onlyoffice/ /
            - https://apps.nextcloud.com/apps/text
            - https://apps.nextcloud.com/apps/calendar
            - …
    - Accounting
        - GnuCash
            - https://wiki.gnucash.org/wiki/Using_GnuCash

Part 6: Conclusion

Evaluation and Follow-up

TARGET: Organizers of the event take feedback from participants on the quality of the training, participants once again re-think the training content and used methodology and have a time to share their feelings and get introduction to the next session.

CONTENT: Evaluation of the session

METHOD: Evaluation form and discussion

METHOD DESCRIPTION: Participants fill in the prepared evaluation form and discuss with the facilitator and lecturers the content and methodology.

TOOLS: Evaluation form in a hard copy

DURATION: 45 minutes

MODULE 4 - Participatory inclusion techniques

Introduction

The fourth module of Solid base puts focus on the most special aspect of SFS's, the community-based operation. In the case of these initiatives, a group of consumers pay a fair price for the food produced, and often undertake volunteer tasks in coordination. This form of special operation is usually a challenge for those who have never been engaged in a community-based initiative. The long-term financial sustainability of these initiatives are strongly dependent on community management, communication and transparent operation. With the presentation of some key participatory inclusion techniques, M4 contributes to the improvement of those key soft skills, which could support the most engaged farmers or consumers in building successful food communities.

Target group

The fourth module is for those adult learners who are planning to be/are engaged in the operation of SFS's, and will be/are involved in community based management and operation. The partner organizations primarily tested the module with stakeholders of CSA communities, but the topic could be relevant for other local solidarity based food communities (e.g. buying groups, cooperatives or community managed farmers market etc.) in which the democratic and participative operation is strongly reliant on the local communities.

Prerequisites

Ideally, to ensure continuity, those adult learners should participate in M1-3 prior to participating in the M4 training events However, with the use of a selection method (e.g. questionnaire, personal interviews) those participants with some practical experience in the community-based management of SFS's can also join . It is also advised to invite different stakeholders (e.g. farmers, coordinators, members of core groups), as module 4 is focused on inclusion techniques, so the different points of view of these groups are important for the learning process.

The aim of the Module

The fourth training module of Solid Base puts focus on the most special aspect of SFS's, the community-based operation, which requires special knowledge: community-based decision making techniques, participatory budgeting, task sharing, working with volunteers, and problem solving (giving feedback and conflict management).

Main topics

The main topics of the module are:

- Community-based organization and planning
- Consensus decision making
- Sociocracy
- Lifecycle of group dynamics
- Facilitation of meetings
- Giving feedback
- Escalation of conflicts

Targets and outputs

Adult learners of Module 4 gain special soft skills, which are needed for the successful management of SFSs initiatives:

- Group development and conflict management skills, along with the use of communication techniques.
- Facilitation of group based problem solving, decision making and planning.
- Understanding of consensus building.
- Understanding of volunteer management.
- Basic organizational skills for social entrepreneurships.

Facilitation and training principles

Training methodology applied on the test training events will follow the participatory approach of Solid Base training program: intensive participation of individuals, interactive group work, group-based planning, future planning, short presentations, giving feedback, problem-solving schemes and drama-pedagogy will all be applied. Participants will have the chance for the informal experience sharing during the breaks.

Module detailed content and methodology

Part 1: Warm- up

Icebreaker and introduction of participants

- **TARGET AND SKILLS:**
  Participants reconnect and welcome those who are new in the group. (Based on the logic of Solid Base, it is possible that new-comers will participate on M4, even if the other learners have participated on M1-3). Getting to know each other helps in building a safe atmosphere and is needed for the group-based methodologies. The short summary of M4 introduces the focus and the outline of the day.
- **CONTENT:**
  1. *Short introduction* to the schedule of the module and connection to previous training events
  2. *Welcoming new faces in the group, reconnecting*
- **METHOD:**
  1. Individual presentation/introduction
  2. "Magic ball"
- **METHOD DESCRIPTION:**
  1. One of the trainers briefly summarises the aim and schedule of Module 4 and explains how it is connected to M1-3 of Solid base.

2. With the group standing in a circle, the trainer introduces the **'magic ball'** to the participants. That person with the ball in his or her hands has the right to speak, but the ball can stand only for up to 1 minute with a single person. The trainer throws the ball to one of the participants, simultaneously saying his/her name. That person catches the imaginary ball and tells his/her own name again, his/her role ('producer', 'member' or 'coordinator') and his/ her motivation to be there. The co-trainer of this exercise checks the time and if it gets longer than 1 minute, rings a little bell or gives some voice signal.

- **TOOLS:**
  Ball (but it could be replaced by an "imaginary" ball)
- **DURATION:**
  1. 5 minutes-25 minutes
- **RESOURCES:**

About Solid base training programme: https://urgenci.net/solid-base/

More icebreakers: https://sixth.ucsd.edu/_files/_home/student-life/icebreakers-teambuilding-activities-energizers.pdf

Mapping of the current situations at CSA`s

- **TARGET AND SKILLS:** This session helps to identify the main challenges generally faced when working with people, groups and communities, based on adult learners' personal experiences. As this is one of the key topics of the module, the methodology contributes to the recognition of the day's focus by the learners and will also serve as a foundation for the next sessions.
- **CONTENT:** Based on some key statements, learners could express their opinion on working with people, groups or communities, with a special focus on LSPA's (local solidarity based partnerships for agroecology) and CSA. The statements could be changed based on the local circumstances or needs.
  Suggested statements:
  - Main challenge to work with people is to communicate properly
  - CSA is a community, because people have the same value system
  - In a community everybody should be equally involved
  - Volunteering is a key activity in community building
- **METHOD:** Sociometric methods
- **METHOD DESCRIPTION:** Trainers ask the participants to stand up, and shows them an "imaginary line" in the room. This acts as a scale: one end of the line means "I totally agree", the opposite end means "I totally disagree". Trainers read off the statements one by one, and asks the learners to stand on the imaginary scale as they agree/disagree with the statement. As all of them find a place on the line, trainers ask 4-5 participants why they chose that part of the scale. It is recommended to either choose those who are standing at the end points or the middle of scale.

Statements could be adapted to the local circumstances, but the time limit only allows to work with 3-4 if combined with 7-10 minutes for discussions.

- **TOOLS**: A cord could be used to show the line.
- **DURATION**: 30 minutes
- **RESOURCES**:-

The ideal CSA, where should we get?

- **TARGET AND SKILLS**: Envisioning where they hope to end up will help connect the learners even more with the practical community building activities, and should be done during the training event or even later. The activity improves the planning skills of participants.
- **CONTENT**: Adult learners visualize their CSA's, thinking on the best practices in terms of communication, relation between the members (consumers/eaters) and the farmer, group cooperation, planning activities and contributions.
- **METHOD**: Visioning in small groups and plenary
- **METHOD DESCRIPTION**:

  Trainers form 3 small groups (with 4 people in each if we plan with 12 participants), and asks them to draw their ideal parts of CSA's on a big paper. Relation among actors should be included, key words could be added. Main actors for the list (this could differ in each country, based on the local characteristics of CSAs): CSA farmer(s), coordinator(s), members, workers. For better understanding, the key actors could be listed on a flipchart or a whiteboard during the session.

  Guiding questions could be added by trainers, for example:

  - How is the communication organized among the main actors?
  - When is the planning organized? Which actors are involved in this activity and how?
  - What are the main contributions from the different actors?

  Groups have 15 minutes to draw the pictures, 2) then each group presents its work in 5 minutes each and a 3) 10 minutes long big group discussion closes the session. In the big group discussion trainers highlight the main similarities and differences between the groups, and explains the importance of relationships in a CSA/community.
- **TOOLS**: Flipcharts, colorful pens and pencils
- **DURATION**: 40 minutes
- **RESOURCES**:-

Part 2: Decision-making techniques

What is consensus decision making and how does it work in a group or CSA?

- **TARGET AND SKILLS**:

Consensus building is an important tool of active citizenship. It is based on the values of equality, freedom, co-operation and respect for everyone's needs, which are all essential for CSA communities. The community based technique is important, not only to fully involve group members in decision making, but also contributes to the development of the sense of ownership. Consensus building involves looking for 'win-win' solutions that are acceptable to all. When everyone agrees with a decision, they are much more likely to implement it. In the long run, people are also more likely to stay involved in a group that is committed to hearing their views and meeting their needs. Training participants learn basic information on consensus decision making and list how they can utilize it in their communities, all while gaining basic problem-solving soft skills.

- **CONTENT**:
  The following steps about consensus decision-making are introduced for the adult learners.

(Detailed flowchart and main source: https://www.seedsforchange.org.uk/consflow.pdf)

1. Introduce and clarify the issues to be decided. Share the relevant information.
2. Explore the issue and look for ideas. Collecting issues and concerns; collect ideas to solve the problem; have a broad ranging discussion and debate ideas. Start thinking about solutions to people's concerns. Eliminate some ideas, short list others.
3. Look for emerging proposals. Look for a proposal that weaves together the best elements of the ideas discussed. Look for a solution that addresses people's key concerns.
4. Discuss, clarify and amend your proposal. Ensure that any remaining concerns are heard and that everyone has a chance to contribute. Look for amendments that make the proposal even more acceptable to the group.
5. Test for agreement. If there is an agreement, you should check the blocks, stand asides, reservations, agreement, and consensus.
6. Implement the decision: If there are no blocks, not too many stand asides or reservations and there is an active agreement, the decision should be implemented. The group should decide who, when and how it will be carried out.

- **METHOD**: Small group discussion and plenary
- **METHOD DESCRIPTION**:
  What are the steps in this type of decision making? Participants work in pairs or trios and all get a short description of the 6 steps. Pairs have 8 minutes to discuss the given step and collect a list of how that step can work well, or go wrong (preferably from experiences of their work in their own CSA, but could be other examples as well). In plenary, pairs introduce their list of experiences, and, to close, the group a discusses why this process is important in the life of a CSA.
- **TOOLS**: Printed lists of the 6 main steps, flipcharts, pens, pencils
- **DURATION**: 60 minutes
- **RESOURCES**:
  Guide on consensus making: https://www.seedsforchange.org.uk/consensus

A Consensus Handbook Cooperative decision-making for activists, coops and communities, Seeds for Change Lancaster Cooperative Ltd, 2013

OPTION: SOCIOCRACY:

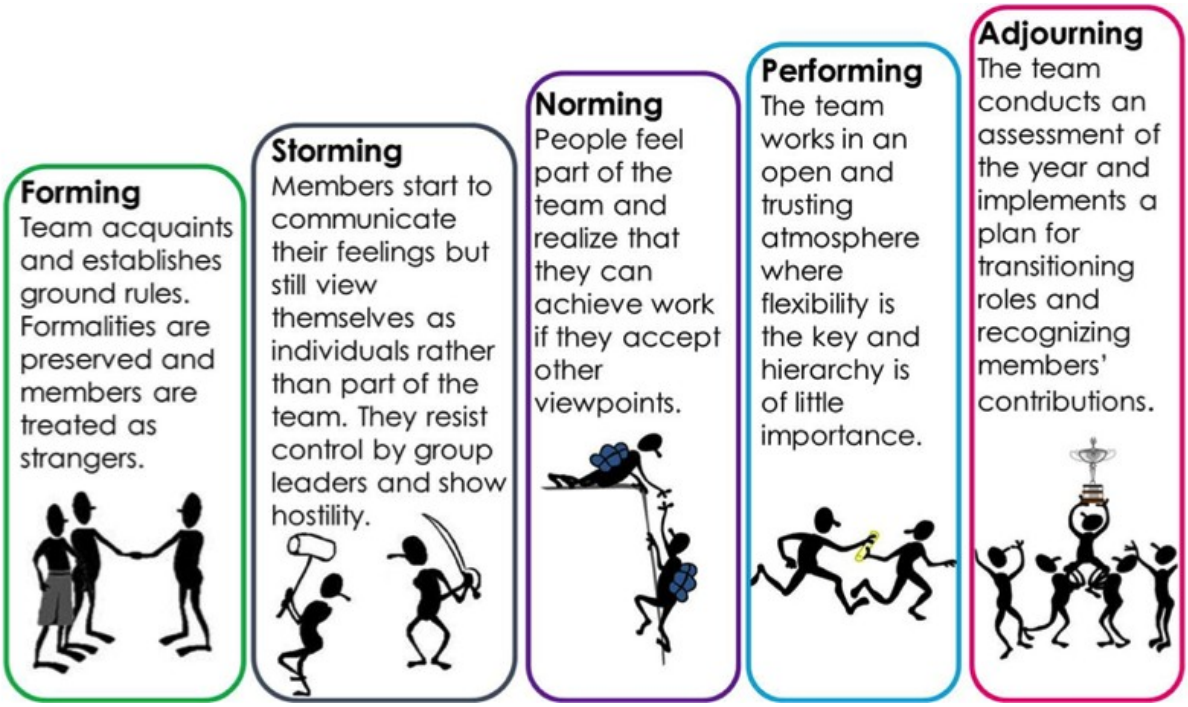
If you work with more established CSAs or networks, the consensus decision making could be replaced or completed by the topic of sociocracy.
Sociocracy is a new, socially responsible system of governance, first founded in The Netherlands, and is an unique form of organisation and decision-making applied by some CSA's. Originally envisioned in 1945 by Kees Boeke, sociocracy allows people to give and receive effective leadership while remaining peers. It is a methodology of self-governance that consists of three main elements (http://sociocracyforall.org). More information on the topic could be found in the participant's booklet.

Theory bubble - lifecycle of group dynamics

- **TARGET AND SKILLS:**
  A short, but important theory is introduced which helps to understand the lifecycle of group dynamics. This could be essential for LSPA and CSA communities, as coordinators and other main organizers need to understand that "storming" is a typical stage of community development which can be treated. In the case of CSA's where different kinds of tasks arise simultaneously (etc. farming, communication, delivery, community building), well-planned and conscious coordination, task-sharing and cooperation are crucial success factors.
- **CONTENT:**
  Trainers explain the theory of Bruce Tuckman, "forming, storming, norming and performing," on the developmental sequence of small groups.

1) Forming: In this stage, most team members are positive and polite. Some are anxious, as they haven't fully understood what work the team will do. This stage can last for some time as people start to work together, and as they make an effort to get to know their new colleagues.
2) Storming: The team moves into the storming phase, where people start to push against the boundaries established in the forming stage. This is the stage where many teams fail.
3) Norming: "Resolved disagreements and personality clashes result in greater intimacy, and a spirit of cooperation emerges." Group members know one another better, they may socialize together, and they are able to ask one another for help and provide constructive feedback. People develop a stronger commitment to the group's goal.
4) Performing: "With group norms and roles established, group members focus on achieving common goals, often reaching an unexpectedly high level of success." It

feels easy to be part of the team at this stage, and people who join or leave won't disrupt performance.



Source: http://ns4business.com.br/tuckmans-stages-of-group-development/

- **METHOD**: Presentation and plenary
- **METHOD DESCRIPTION**:

Trainers explain the theory in 10 minutes, with the use of a presentation or short film. The group has 15 minutes to discuss the topic. One question which could start the discussion is:

"What stages have you experienced in your CSA work?"

Trainers ask for real life situations and help to identify which stages these are connected to in Tuckman's theory.

- **TOOLS**: Presentation
- **DURATION**: 25 minutes
- **RESOURCES**:
  https://www.mindtools.com/pages/article/newLDR_86.htm
  https://en.wikipedia.org/wiki/Tuckman%27s_stages_of_group_development
  B W Tuckman and M A C Jensen (1977), 'Stages of small group development revisited', Group and Organization Studies, vol.2, no.4, pp.419-27.

Part 3: Facilitation and giving feedback

WHAT IS A FACILITATED MEETING, WHY IT IS GOOD FOR COMMUNITIES?

- **TARGET AND SKILLS**:

In the life of a CSA or LSPAm community meetings are essential in everyday functionality, and especially in strategic decision making. Food community members should get information, express their opinions, take responsibilities and decide on common questions. However, without the help of a professional facilitator, it is not easy to

stay with an agenda, deal with dominating people, listen to everyone or finish meetings on time. In order to avoid this problem, core members of CSA communities should have the basic skills required for facilitation of this kind. Facilitation can be learnt by using practical experiences, by reflecting on your own experience of meetings and observing other facilitators. Meeting facilitation, specifically, combines a series of roles and tasks. For example: keeping people on topic, time-keeping, listening carefully to what everyone is saying and problem-solving. In this session, participants will be guided through the main steps of a facilitated meeting, using their personal experiences.

- **CONTENT:**

Training participants learn about the main steps of a facilitated meeting, which are:

1. Preparation (What is this meeting about, where do we want to get? Making agenda)
2. Starting point
3. I-We-It (According to Kay Tift, in any group, three major topics are always on the agenda. We can call them "I", "We" and "It." "I" is about who I am and how I feel right now. "It" is about I–you relationships within the group. "We" is about our behavior towards each other, for example our meeting culture, everything to do with our common relations. This theory is about what we do together, our collective task or focus.)
4. Signs, signals (What are the signs to determine if people are fully present or not throughout the process? Energy level, group dynamics)
5. Inclusion in group process - (How can you include everybody`s opinions, doubts, ect?) -
6. Closure (expressions, next steps, feelings)

- **METHOD**: Small group discussion
- **METHOD DESCRIPTION:**

I. part: Let's go through the process of a meeting or discussion! Trainers create a flow of a river using scarfs or paper to imitate the river. Have the 6 points written readable easily on a piece of paper. Conduct the group through the river, putting down the pieces of papers on the floor and asking questions about each stage (why is it important, what experiences they have to share connected to each stage).
Preferably, two trainers work with two smaller groups.

II. part: Plenary discussion about the topic, questions, sharing of experiences. Trainers could start this session with short summaries on the main findings in their groups.

- **TOOLS**: Scarf or paper, 6 points printed on papers
- **DURATION**: 30 minutes for short group discussion + 15 minutes for plenary
- **RESOURCES:**

Long guide:https://www.seedsforchange.org.uk/facilitationmeeting

Tools: https://www.seedsforchange.org.uk/tools

Hand signals: https://www.seedsforchange.org.uk/handsig.pdf

Facilitation meetings, A guide to making your meetings effective, inclusive and enjoyable, Seeds for Change, 2019

HOW TO GIVE FEEDBACK IN THE RIGHT WAYS?

- **TARGET AND SKILLS:**

  Clear communication and giving feedback in the right way is essential to the prevention of problems and contributes to building strong communities. In the case of CSA's, it is not always clear how different actors can give feedback to each other, however, if the evaluation methodologies are well planned, some basic tools could be applied to develop regular feedback giving mechanisms (e.g. evaluation questionnaires about the year, planning meeting). Additionally, there could be other ad-hoc issues when constructive feedback mechanisms could prevent many long-term conflicts. Just think about the operation of CSA's! It often happens that "consumers/eaters" dare not give feedback on the quality or quantity of product, or a CSA farmer dare not talk about costs and prices due to anxiety of what the other group might think. Community coordinators can help by facilitating this process with some easy methodologies and using their skills for conflict solving.

- **CONTENT:**

  There are several methodologies which can help communities to give feedback in an effective and nonviolent way.

  The easily understandable and adaptable nature of the B.O.F.F. model allows it to apply very specifically in many different situations when we need to give feedback. The acronym explains how it works in practice.

  - Behavior - describe the behavior you wish to provide feedback on
  - Outcome - describe the result of the behavior in question
  - Feeling - how the behavior / result made you feel
  - Future - what you expect in the future

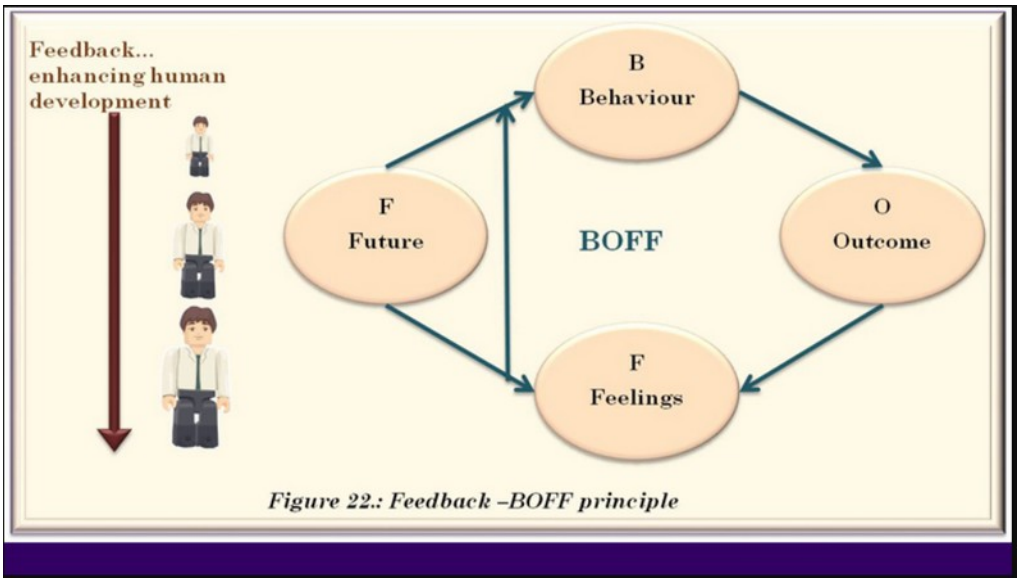


Figure 22.: Feedback –BOFF principle

Source: Performance management, Veresné dr. Somosi Mariann, Hogya Orsolya (2011), Nemzeti Tankönyvkiadó,

https://www.tankonyvtar.hu/hu/tartalom/tamop425/0049_02_performance_management/5543/index.html

Non-violent communication can also help to express our feedback. Although this is a complex methodology, trainers can still mention the technique and main elements of it.

The basics of Nonviolent Communication involve expressing ourselves with clarity, compassion, self-responsibility, empathy, and the common good in mind. This is the exact opposite of what violent communication is.
NVC uses consciousness, language, and communication skills to create a framework from which you can:

- express your feelings and needs with clarity and self-responsibility;
- listen to others' feelings and needs with compassion and empathy;
- facilitate mutually beneficial outcomes for all parties involved.

According to the Center for Nonviolent Communication first, we observe what is actually happening in a situation: what are we observing others saying or doing that is either enriching or not enriching our life? The trick is to be able to articulate this observation without introducing any judgment or evaluation—to simply say what people are doing that we either like or don't like. Next, we state how we feel when we observe this action: are we hurt, scared, joyful, amused, irritated? And thirdly, we say what needs of ours are connected to the feelings we have identified. An awareness of these three components is present when we use NVC to clearly and honestly express how we feel.

Even if training participants are not familiar with all details of non-violent communication, the main guidelines can help in CSA communities.

- **METHOD**: Interactive theatre
- **METHOD DESCRIPTION**:
  We form 3 small groups and give to each 1-3 typical situations where feedback is really important, for example:
  1. a member does not come to pick-up his or her box/share
  2. a member is not satisfied for some reason with the product
  3. a member offers his or her voluntary contribution of developing the webpage of the community, but she/he is late

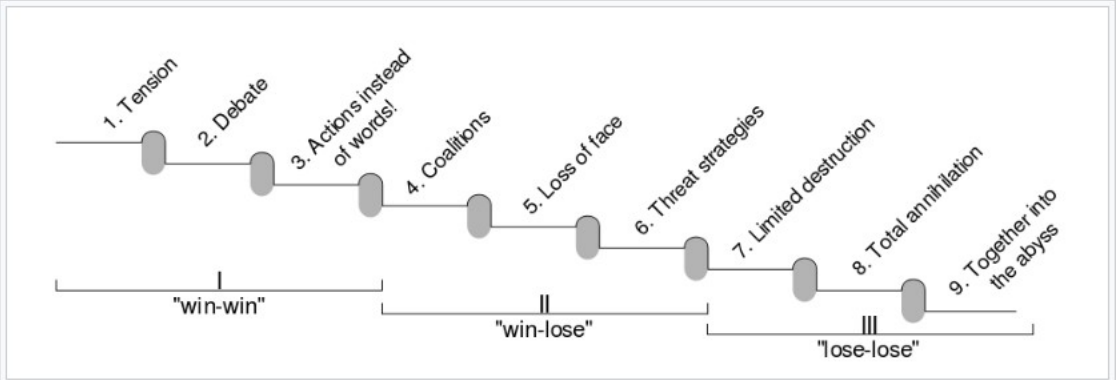
  The situations could differ in each country based on national circumstances.
  Groups get 10 minutes to prepare. We ask the group members to nominate one person who will be the farmer/coordinator and show the correct way of giving feedback. First we see what the scenario would be if the farmer/coordinator gave

feedback in the usual way (3 min) then we see the scenario when the farmer/coordinator gives feedback in a constructive way (3 min). Over the next five minutes, the audience has the opportunity to replace the role of the farmer/coordinator and demonstrate a different way proper feedback could be given. The next group comes and does the same process. At the end, we summarize what the best feedback scenarios we saw in the theatre scenes were (around 15 min).

- **TOOLS**: Situations printed on cards
- **DURATION**: 60 minutes
- **RESOURCES**:
  Non-violent communication:https://www.nonviolentcommunication.com/aboutnvc/aboutnvc.htm
  Center for Nonviolent communication: https://www.cnvc.org/learn-nvc/what-is-nvc

BUBBLE THEORY: ESCALATION OF CONFLICTS

- **TARGET AND SKILLS:**
  Conflicts arise in each community, and it is not always easy to solve them. To properly treat conflicts, it is important to understand the main aspects of them. These can help guide us to an effective conflict resolution system. In this session, participants learn about one model of conflict escalation and get to know some key elements of conflict solving.
- **CONTENT:**
  Trainers will introduce Friedrich Glasl's model of conflict escalation, which explains the analyses of conflicts. Glasl's model shows that as a conflict gets deeper, it can only be treated by external actors (e.g. meditator). The theory could be used for analyses of many kinds of conflict (e.g. a divorce, conflict between colleagues, etc.), but conflicts in a CSA can also be analyzed with the use of this same model.
  The model has nine stages which are grouped into three levels.



The nine stages of conflict escalation

LEVEL 1. (WIN-WIN):

The common solution is possible on this level. If the stakeholders of the conflict find a common solution, all parties will be satisfied. This conflict could be constructive.
Stage 1. Tension: Even though it is often not recognized by the individual parties, conflicts usually start with tensions. At this stage the situation is still harmless, differences of opinion are commonplace and can be resolved through discussion.
Stage 2. Debate: The disagreement becomes more fundamental, everybody insists on their own point of view, uncompromising black-and-white thinking and verbal violence. This is the point when stakeholders start to talk about their problems.
Stage 3. Actions instead of words: The conflicting parties increase the pressure on each other in order to assert their own opinion. Discussions are broken off. No more verbal communication takes place and the conflict is increasingly exacerbated.

LEVEL 2. (WIN-LOSE)
In order to have a common solution at this level, an external actor is needed. If, at this level, a solution is forced, only one stakeholder will be satisfied (win position). The other(s) will feel that they lost the conflict. In this case, the conflict is destructive.

Stage 4. Coalitions: The opponents search for supporters and allies and parties are formed. It is no longer about the original issue, but about winning the conflict.
Stage 5. Loss of face: The loss of trust is complete. In this sense, loss of face means the loss of moral credibility, when stakeholders of the conflict try to find allies and direct their attention to the “wrong” position of the other(s).
Stage 6. Threat strategies: Through threats and counter threats, the conflicting parties try to win. The more credible the possibility of punishment, the more effective the threat and the sooner the demand will be met. This is about who has more power.

LEVEL 3. (LOSE-LOSE)
At level 3. the external actor is no longer enough to solve the conflict, authorities are needed (e.g. military, court). The aim should be to minimize the loss.

Stage 7. Limited destruction: At this first stage, one’s own damage is only accepted if the other’s damage is greater. Humanity is over now, all tricks are used to harm the opponent. The opponent is no longer perceived as a human being, but as a thing without feelings.
Stage 8. Total annihilation: The opponent is to be annihilated by all means.
Stage 9. Together into the abyss: Once this point is reached, personal annihilation is accepted in order to defeat the opponent. Self-destruction is accepted.

Conflict solving based on this theory:

1. Identifying the conflict: At this stage we identify the situation, the "conflict". The conflict causes stress, so we might identify feelings, special behaviors or symptoms.
2. Decision on cooperation: We can only manage this step if we already recognize there is a conflict. We should consider if we are capable of cooperation, the importance of the topic, how threatening the situation is and what the result of the cooperation could be. With the decision to build cooperation, we build trust.
3. Mapping the needs: We should aim to clearly examine the needs of the stakeholders' values and points of view.
4. Identifying the methodologies which can help in solving the conflict: We should identify as many ways for solving the conflict as we can. We can organize a brainstorming session.
5. Agreement, plan: Stakeholders choose the methodology which is suitable for them and work on an agreement. We should list the steps which are needed for solving the problem.

- **METHOD**: Presentation
- **METHOD DESCRIPTION**: Trainers briefly explain the theory while highlighting the stages of LEVEL 1, as these could be important for the CSA communities. After explaining the conflict escalation theory, the trainers should also explain the theory of conflict solving. As there is not much time for this session, participants will find more information about the theory in the booklet.
- **TOOLS**: PPT
- **DURATION**: 25 minutes
- **RESOURCES**:

https://en.wikipedia.org/wiki/Friedrich_Glasl%27s_model_of_conflict_escalation
https://dieprojektmanager.com/9-stages-of-conflict-escalation-according-to-friedrich-glasl/

HU: https://www.tankonyvtar.hu/hu/tartalom/tamop412A/2010-0019_konfliktus_kezeles/ch12.html

Glasl F. (1982) The Process of Conflict Escalation and Roles of Third Parties. In: Bomers G.B.J., Peterson R.B. (eds) Conflict Management and Industrial Relations. Springer, Dordrecht

Part 4: Closure

NEXT STEPS

- **TARGET AND SKILLS:**

At the end of the training day, the lessons are synthetized in a participative way, using some basic planning activities.

- **CONTENT:**
  The methodology will focus on future planning. Planning is essential to the success of any initiative. When a community has a plan to follow, all members are better equipped to prepare for the future.
- **METHOD:**
  Revisit the morning's pictures of the ideal CSA. Trainers start the activity by raising the following questions: *what do you have to do as a CSA coordinator to make progress towards this goal?*
- **METHOD DESCRIPTION:**
  Trainers ask each participant to think about the topics they learned today along with the ideal CSA they drafted. Based on these two concepts, adult learners have 10 minutes to list what they plan to do to help their own CSA/food community become "ideal".
  After this activity, trainers organize into pairs. Participants can work with their neighbors, or we can ask them to choose partners. Trainers explain that they have 20 minutes to walk around in the room – or, ideally, the building- and discuss their plans with each other.
  As the pairs become ready, the trainers bring the group back to a plenary discussion and ask the participants to explain the most important elements of their plans. This should be only a summary, as there is only 10 minutes for this exercise.
- **TOOLS:** Papers and plans if it is needed for individual planning
- **DURATION:** 30 min
- **RESOURCES:**

CONCLUSION

- **TARGET AND SKILLS:**
  The aim of this session is to summarize the learning process of the day and evaluate the training. Participants feel connectivity with the other members of the group.
- **CONTENT:**
  Groups sharing
- **METHOD:**
  Plenary sharing, feedbacks
- **METHOD DESCRIPTION:**
  The trainer asks each participant to answer these questions: How do you evaluate this day? How did you feel about yourself? What did you like the most and what would you change?
  The one who starts gets a ball of string and once they finish, they throw the ball to someone else in the group, keeping the starting end of the string. The next person

does the same, keeping the string in his/her hand. At the end it will be a net of connection.

After the activity, adult learners are asked to fill in an anonymous questionnaire on the training events (content, performance of trainers or presenters, atmosphere etc.)

- **Tools**: ball of string, questionnaires
- **Duration:** 30 min
- **Resources:**

Impressum

Published in 2020 as part of the Solid Base international project that was funded by the European Union under the Erasmus+ programme and conducted in partnership by:
Association of Conscious Consumers (TVE): www.tudatosvasarlo.hu
Asociace místních potravinových iniciativ (AMPI), www.asociaceampi.cz
Die Agronauten, www.agronauten.net
Solidarische Landwirtschaft (Solawi), www.solidarische-landwirtschaft.org
URGENCI, www.urgenci.net

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Co-funded by the Erasmus+ programme of the European Union. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.