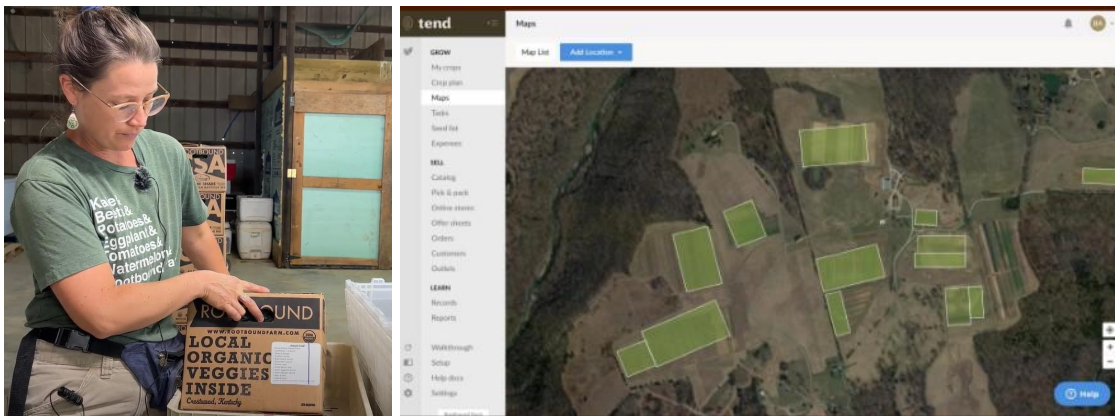


Summary & Resources - Virtual November 2022 OAK Farmer Field Day



Digging In To CSA Planning, Recordkeeping, and Marketing

Community supported agriculture (CSA) is a local, subscription-based food distribution model where members commit to purchasing a share of a farm's harvest in advance. During the season(s) customers pick up a weekly box of produce or other farm products to cook with at home. CSA farming necessitates business operations upholding diverse crop production, customer service and community relationship-building.

During OAK's Virtual November Field Day, farmers from Mustard Seed CSA, Rootbound Farm, Shared Legacy Farm/MyDigitalFarmer and the University of Kentucky (UK) CSA Farm presented their top tips and tools for CSA planning, recordkeeping and marketing.

CSA Planning

Planning for CSA is unlike any other business model. CSA farms are often growing 15-40 different crops that will sequentially fill weekly boxes over a period of months, or even all year! As CSA farms depend on member subscriptions, farmers are very tuned in to their customers' preferences and priorities. This can mean growing a variety of crops because customers love to try new vegetables, cutting down on less popular items or overwintering a crop that can diversify an early spring share. Rootbound Farm, which allows its shareholders to customize their weekly box, creates a "base" or default share of 6-9 items each week and lists additional available items on their CSA software. They have found that about 60% of their shareholders customize their box each week - switching out 1-4 items. While this may sound daunting, the resulting

customer satisfaction has built a robust customer base and has allowed the farm to learn and evolve based on customer trends.

Cooperative farming is a wonderful model for multiple farms to contribute to a CSA share. The two farms that contribute to the Mustard Seed CSA plan and track their crops together. While they operate as independent businesses, they share records on inputs, production and yield pertaining to the CSA crops. Further, each cooperating farm sets their financial targets for the season and communicates their holistic goals based on each farmer's life and business intentions, thinking through questions like: What does each farmer enjoy growing? What does each farmer grow well? What else is going on in life that can open up or limit time for CSA production?

From large, single-farm CSA production to multi-farm CSA models, there are many business planning strategies to learn and trial in the local food market.

CSA Recordkeeping

The participating CSA farms shared a common ideal: the key to great recordkeeping is great planning. The farms discussed their journeys trialing, modifying and adopting a variety of methods for planning and recordkeeping - from using software to track goals, inputs and yield per crop row to sharing spreadsheets to track production and yield data across farms. Farmers mentioned documenting both *planned* and *actual* production information to capture anomalies and document trends, serving as building blocks to future crop plans.

Further, sound recordkeeping is required for certified organic operations. UK's CSA farmer reframes the potential burden of this requirement. She uses the organic recordkeeping requirements to the farm's advantage by building practices around recordkeeping. Historic field maps inform this year's crop rotations and sequencing. Student workers write down the day's progress in each crop field to capture trends and anomalies. Equipment is set up in advance to apply the exact input planned for a field. Each step reinforces the farm's Organic System Plan and spreads out accountability for the farm's recordkeeping. While recordkeeping takes practice, the insights and templates from farms and organizations that support farmers can help new and experienced farmers engage in the CSA model with confidence.

CSA Marketing



CSA is a unique product, so there's no surprise that CSA marketing is unique too! Corinna Bench of MyDigitalFarmer shared that it takes time to warm up a potential CSA customer. As a subscription-based product, CSA relies on relationships in the local community and with individual customers. In fact, it usually takes a few years for someone to become a CSA member, and even then, customers benefit greatly from resources like recipes and storage tips to become comfortable and successful with their share.

Many times CSA customers possess at least a few of the following characteristics: they value local products, transparency in the food system, cooking at home, diverse vegetables, relationships with their farmers, food's role in personal health and environmental stewardship/low carbon footprints. Marketing CSA is about more than selling vegetables in a box - it's about communicating the transformations that can occur when someone becomes a CSA member. Farms were encouraged to communicate that CSA can deliver better health and meals, influence the local food economy and serve an educational purpose for kids, families and friends eating together.

Gratitude to Participating Farms

The farms that participated in OAK's November field day are not only building Kentucky and Ohio's CSA movement, but also continue to add value in their communities. From offering or growing for sliding scale CSA programs to training young adults in sustainable agriculture, these farms continue to shine brightly and amplify a food system that provides healthy food to local communities.

OAK is grateful to the wonderful participating farmers with Mustard Seed CSA, Rootbound Farm, Shared Legacy Farm/MyDigitalFarmer and the UK CSA Farm who shared their time, experience and practices during OAK's Farmer Field Day of November 2022. Thank you, thank you!

Field Day Recording Here:  [Digging in to CSA Planning, Recordkeeping and Marketing](#)
Slide Deck PDF Here:  [OAK Virtual CSA Field Day 11.1.22.pdf](#)

The farmers shared all kinds of tips and techniques for big picture and day-to-day operations. See the resource list below and watch the recording to delve deeper!

Resource Links:

- OAK resources:
 - [Upcoming OAK Farmer Field Days](#)
 - [Join OAK today!](#)
 - [OAK newsletters](#) - for farmers and consumers
 - [OAK YouTube](#) farmer resources / conference and field day playlists
 - [OAK Transition Trainer program](#) - for assistance with certifying organic

- Ben Abell, Rootbound Farm:
 - www.rootboundfarm.com
 - www.facebook.com/rootboundfarm
 - www.instagram.com/rootboundfarm
 - Rootbound uses these apps (referenced in their presentation):
 - [Farmigo.com](https://farmigo.com) for CSA share sales and customization and member management
 - Rootbound Farm's Farmigo page:
<https://csa.farmigo.com/join/rootboundfarmcsa>
 - [Tend.com](https://tend.com) for production management and recordkeeping
 - Bonus videos:
 - [Rootbound CSA Boxes in Packing Line Video](#)
 - [Rootbound Whiteboard CSA Packing List Video](#)

- Corinna Bench, Shared Legacy Farm & My Digital Farmer
 - Finding Your First 10 Customers - How I'd Start My CSA if I were doing it all over again – [Episode 48](#) of the My Digital Farmer Podcast.
 - [CSA Membership Academy](#) – a digital resource library for CSA farmers to use to help their CSA members master CSA faster. First month trial for \$1, using coupon code TRIAL.

- [Tips and Tricks for CSA Success Ebook](#) – Canva Template. An e-guide that spells out the CSA hacks shared by CSA master members to help rookies shortcut to mastery faster.
 - www.MyDigitalFarmer.com
 - www.SharedLegacyFarms.com
 - Instagram: @mydigitalfarmer, @slfarms2
 - [Facebook.com/groups/csamarketing](https://www.facebook.com/groups/csamarketing)
 - [Facebook.com/SharedLegacyFarms](https://www.facebook.com/SharedLegacyFarms)
 - [Facebook.com/mydigitalfarmer](https://www.facebook.com/mydigitalfarmer)
- Kristi Durbin, UK CSA:
 - **UK CSA has just released the [CSA Production Manual](#) as a downloadable resource for all!** Kristi Durbin completed this work in fulfillment of a master's degree of science in integrated plant and soil science. Kristi has worked as the University of Kentucky Community Supported Agriculture (UK-CSA) manager since February 2016. All information gathered for this project was the result of documenting production practices and improvements made since the program's inception - including customizable Excel workbooks: **Share & Field Planner** and **Fertility Planner**
 - <https://sustainableag.ca.uky.edu/csa>
 - [Member Agreement](#)
 - <https://ukcsa.wordpress.com/>
 - <https://www.flickr.com/photos/ukcsa/>
 - [Instagram](#) and [Facebook](#)
 - [YouTube Channel](#) - Virtual Tour of UK Horticulture Research Farm, Packing Shed, and more
 - Videos shared during the field day
 - [UK Production Planning Team Whiteboard](#)
 - [UK Planting Records Team Binder](#)
 - [UK Organic Records Equipment Use Binder](#)
 - <https://www.uky.edu/ccd/tools/budgets/ukcsaeconomicanalysis>
 - [UK CSA Crop Budget Workbook \(.xlsx\)](#)
 - [UK CSA Whole Farm Analysis \(.xlsx\)](#)
- Marykate Glenn & Lyric Morris Latchaw, Mustard Seed Farm CSA:
 - Instagram: @mustardseedfarmCSA , @mount.marigold
 - Facebook: @mustardseedfarmCSA
<https://www.facebook.com/Mustard-Seed-Farm-CSA-1067722309932649/>
 - Mustardseedfarmer.webnode.com
- Additional Resources:
 - CSA Innovation Network: <https://www.csainnovationnetwork.org/>
 - The CSA Innovation Network is planning an online CSA early bird renewal training/challenge with Corinna, **November 14-18**. It will feature short training videos and prompts to guide you through the process of setting up your renewal campaign for CSA customers. Sign up for CSA-IN email updates for more information. Follow the link and scroll down to “get updates by email.”
 - [Wholesale Success](#) by Atina Diffley (book referenced by attendee in chat)

- [Roxbury Farm Planning Resources](#) (Kristi referenced this in her presentation)
- Food Safety Plan/GAP Certification technical assistance for KY farmers: [Bryan Brady](#), [UK Food Connection](#)
- Mobile record keeping app, SeedStory - If anyone is interested in Beta testing, please contact Patrick Ranval at pat.ranval@gmail.com