



## Running a review day for your CSA

This document is intended to help a group in the process of setting up a CSA to take stock and work out what to do next. Many CSAs set out with lots of inspiring ideas, and hold discussions and perhaps a public meeting, and then are unsure how to proceed with the many people and proposals that emerge. People may feel motivated to join the group, but can feel uncertain if the structure and purpose is unclear.

A word of warning! It is not intended that you should follow this day plan to the letter! Think about what your group needs, and alter the suggestions here to suit your situation!

### Planning a day's review session

#### To begin

One or two people can take responsibility for organising and running a review day. The organisers task is to help the group to choose a way forward, not to lead the group towards their own preferred outcomes. If your group is in a muddle you might approach someone and ask them to organise a review day. They will ideally have facilitation skills. They might not be closely involved in the CSA, in fact it might be best if the session is not run by the group's most prominent 'leader'.

Begin by asking several key people where they think the group has got to and what they think a review session needs to address and set a purpose for the session.

For example: By the end of the session, participants will have ....eg" *drafted the headings for a 12 month action plan and agreed on some of the content*"

#### Conflict

Some groups are in conflict that is caused by unclear planning and might progress well with the kinds of activities mentioned below. In other cases, more work is needed on conflict resolution per se. In either case, skills in conflict resolution and good communication skills will be valuable. You may find someone locally with mediation skills, or seek further information for example on Non Violent Communication (NVC) or contact Co-operatives UK.

#### Who should come?

The key stakeholders need to attend. There will probably be several people who really must be there, and you'll need to find a date to suit them. This might include a founder, committed volunteers, the farmer and landowner. If you are looking at overarching and significant issues but not trying to agree details, we recommend working with a larger group, of interested members and supporters. This way you are

likely to increase long term loyalty and commitment. With a good plan and facilitator, you can undertake a review with say up to 30 people present.

You may need to speak to them to explain why you'd like them to give up their time, and to understand what they'd like from the day in order to encourage them to be there. You might consider offering a social event or farm walk to make it more attractive for them to come.

Tell participants what the day is for and what they need to prepare. Explain that it is not one of your usual meetings.

## **On the day**

### **The setting**

Think about the room layout, consider setting chairs in a circle so that everyone feels heard. You might like to have flipcharts at the ready.

### **The introduction session**

Start on time, even if people have not settled down. This sends a message about time keeping for the rest of the session.

Set a finish time, and keep to it.

Explain what the day is for and go through the agenda, including the time allocated for each item. Check it suits people.

Explain the facilitators role, ie that you will help them undertake the day's task, but that you are not in the role of a traditional chair - you will manage the activities, but they will contribute the content and decisions.

Agree some simple rules of conduct, especially if you have some strong characters present, or some emotive issues. For example, no interrupting, keep to the topic, allow others to speak, listen.

Have a round of introductions, unless you are certain everyone knows each other.

### **The parking space**

You might like to have a flipchart labelled 'parking space'. You can write on here issues that come up during the day that are important to people but that do not fit in with the agenda. This helps you to keep the day on track, whilst acknowledging people's concerns.

### **The activities**

Please pick and choose from these activities, and adapt them to suit your needs, these are only examples. Think through how long each might take in your group and organise the day accordingly.

# 1. Where are we now?

## A time line

**Purpose** : Brings everyone up to speed with progress

The facilitator sticks a long sheet of paper on the wall, with some key dates written on it. Everyone who wants one has a post-it, and writes on it key events so far, such as the launch, the time they became involved themselves, locating possible land, etc. They stick these on the timeline.

Someone can then briefly talk through what has happened so far, referring to the time line. This could be a less vocal volunteer who has been involved for a long while, not necessarily the most prominent 'leader' in the group.

## What documents do you already have?

Have a look at any existing documents; make sure everyone is aware of what they say. Eg workplans, business plans, job contracts, mem and arts, etc. They can be altered is required.

## Who is doing what?

Is everyone aware of what is already happening?

Who?	What do they do?	What should they do?	How long does it take?	Who are they accountable to?	Reward (eg pay)	Any issues? (eg are they the right person for the job? Overworked? Disenfranchised? Poorly managed?)
Eg Grower	Produce all the veg and manage all the membership fees	Just grow veg	4 days per week	Core group, but not one named person	3 days per week @£100	Overworked but still enthusiastic. Skilled. Role has taken on management responsibilities not originally intended for the grower.

## A SWOT analysis

**Purpose** : A quick crude analysis of the main issues. Everyone can get their issues heard and noted.

The facilitator draws a large + on a flipchart and labels the quarters Strengths, Weaknesses, Opportunities and Threats. No need to take ages trying to allocate issues that could fit in more than one box, quick and crude is fine.

The group call out issues for each of the quarters and the facilitator writes them down in the right place. For example 'We have no farmer' might be a weakness, 'the council have offered us land' might be an opportunity.

## 2. Where do we want to get to?

### Setting values or principles

**Purpose** : It is very helpful to specify *why* you are setting up a CSA near the beginning. This will guide many future decisions and help determine which choices matter. If people can see that the CSA is following their deeply held beliefs, they are more likely to offer support. If the values are written and displayed and referred to the CSA is more likely to remain an ethical enterprise.

In pairs, set a listener and a speaker. Suggest that they work with someone they don't know. Tell the listener that they will be required to report back on what the speaker has said, so they had better listen properly! The listener is not to speak until it is their turn, apart from to ask 'why does that matter to you?'. Give them 5 or 10 minutes each way, then tell them to swap over.

The speaker is asked to tell the listener what really matters to them about the CSA, what it should be for, what the effect of the CSA should be. The facilitator can display these questions on a flipchart to keep them on track.

After they have both spoken, ask the listener to write down in one sentence chunks on individual cards what really matters to the speaker about the CSA. The speaker can check the wording is correct.

The facilitator collects all the sentences from the group and reads them out one by one. The facilitator can sort them out into similar ideas to do with poverty/ care of the land/ fair trading, etc

Where it is easy, the facilitator can try and suggest sentences that encapsulate several cards. There may be some group discussion and suggestions about wording. You are seeking to reach statements like:

*Widdleworth CSA believes that :*  
*Low income shall not exclude anyone*  
*The land will be stewarded to care for wildlife*  
*People will have an opportunity to reconnect with the land, etc*

You can ask people to show their hands for any cards or statements they disagree with. If you cannot easily reach consensus, just note that these cards need further discussion later, do not reject them now without consent.

At the end of this activity, the facilitator can make a statement of what has been agreed. This will probably be a strong unifying and inspiring statement.

A large group session will not be able to agree detailed wording for all of the principles. The facilitator should ask for a small group of volunteers to thrash out the detailed wording, which can be presented back to the whole group to sign off.

## **Agreeing a vision**

**Purpose** : If the group can agree a long term vision, it will help guide intermediate steps. It is helpful to agree this vision at the beginning, even if it takes years to fulfil it. The vision will be an inspiration.

The facilitator asks each person to formulate their own personal vision for a CSA. How you do this depends on who is there – some people are intimidated by visioning exercises, others love it. You might like to offer choices about this exercise. You can consider a guided mediation where people close their eyes and the facilitator asks them to picture arriving in a world in 5 years time when the town has a perfect thriving CSA, and see what they picture. You might ask people to draw their vision. You might ask people to describe in words what the CSA will become.

The important thing at this stage is to be free from concerns about what is not possible. Ask people to imagine how the CSA will be in years to come if everything goes remarkably well.

When people have privately considered their personal visions, the facilitator has a brainstorm from the whole group asking 'What will Widdleworth CSA be like in 10 years time if everything goes really well?' In a brainstorm, all contributions are accepted and written down. Explain that writing down a comment does not mean that everyone agrees to it.

After the brainstorm, issue everyone with 5 green sticky dots and 2 red ones. Ask them to stick the 5 green dots on the ideas they like best and the red ones on any they disagree with. People can retain their red dots if they agree with everything.

The facilitator can then comment on what they see on the board after this exercise, and allow a little group discussion. The facilitator may be able to sketch a shared vision from the information on the board, or it may be trickier. The ideas may cluster around several different proposals, in which case the facilitator might suggest that the group splits and runs separate projects.

It will probably not be possible to form the exact wording of a vision in a large group. A small group could be appointed to try and form the precise wording and report back.

## **3. How are we going to get there**

### **Mapping out the work ahead**

**Purpose** : this is the start of making a work plan.

The facilitator briefly summarises what the group intends to do. The facilitator asks the group for a list of areas that need working on. Don't go into any detail on any of these, just list the headings. If the group has not mentioned any of the following, prompt them to check whether they need consideration:

- Group structure/ incorporation/ decision making procedures/ roles
- Land
- Farming skills/ farm work
- Financial planning/ budgeting
- Raising funds
- Marketing/ gaining support
- The planning process/ work planning/ business planning/ co-ordination
- Legal issues/ insurance/ policy and good practice
- Evaluation/ review/ monitoring

The list you come up with will provide some headings for your work plan and business plan

## **Setting objectives**

**Purpose** : this exercise is important to help the group be clear about what it is trying to do.

Once you have agreed a vision and the groups values/principles, and using the work plan information, you can set your objectives. This may be easier in a group of about 8 people.

Begin with the issue which is least negotiable – the plan will have to fit together as a whole.

SMART objectives are specific, measurable, achievable, realistic and time framed. If you have smart objectives, you are well on your way towards having a reasonable plan.

“Within a year we will have signed a tenancy agreement for 2-5 acres of suitable organic horticultural land within 8 miles of town” is a more useful statement than “we will look for land”. The latter kinds of statement can lead to muddles.

Try to set a 12 month SMART objective for each heading. If you cannot do this in some headings, make a specific note about what needs to happen to make this possible, or what information is missing, or what point you cannot yet agree upon.

For example if you cannot set a fund raising objective because you don’t know how much money you need to fundraise for, specify what information gaps there are.

## **Work priorities for the coming months**

Under each objective above, try and identify about 5 clear tasks that need to be done in the next year to reach (or identify!) the objective. For the time being, try and ignore what is already happening – this might not turn out to be the most effective activity to continue. This can be done in small workgroups. You might allow people to select a small group to work in, in the field that interests them most.

Display all the activities on the board under each of the headings. You'll need a big bit of paper. For example

<b>Objective</b>	<b>Land</b> - Within a year we will have signed a tenancy agreement for 2-5 acres of suitable organic horticultural land within 8 miles of town"	<b>Gaining support</b> – within a year we will have 30 people who are committed to taking weekly veg boxes and 10 regular farm volunteers	<b>Farm skills</b> - we could not define an objective because we do not know what part the farmer at Puddle Lane will play	etc
<b>Tasks</b>	Meet council to follow up offer of county farm at Puddle Lane	Define the membership agreement and explain it to current supporters	Wait until agreement has been made about Puddle Lane farm, then try again to set objective about recruiting a farmer.	
<b>Task</b>	Advertise for more offers of land through work with media	Speak to local groups to publicise the new CSA	etc	
<b>etc</b>				

Study this carefully and check that plans are realistic, and consistent with each other. Encourage people who think the plans are unrealistic to say so – it is easy to be carried along into a crazy plan by everyone's enthusiasm. You will probably need to pass this table back to the core group for further refinement. They will need to look hard at areas where work is already underway which is not consistent with the new proposals, some changes might need to be planned for.

### Defining success

It will help your group to agree on what success is. You could have a discussion entitled 'are we successful?' or ask small groups to come up with short statements about how you will know that you have been successful. What will be happening when you are successful?

Take careful note of any differences in people's perception of success, these will need to be addressed.

### Getting organised – an interim structure

Once you are trading, you might need a formal legal structure. The tasks in the set up period are different to the tasks for an established CSA and you may have an interim structure to reflect this. It helps if there is a shared understanding about roles and responsibilities.

A common interim structure is for there to be workgroups looking at different issues (probably similar to the headings above) each with a representative on the co-

ordinating 'core group'. In this way, not everyone has to have an opinion on every issue, and progress is faster.

Be aware that this exercise may be emotive for an individual who is presently leading and holds a lot of power. They may have to let go of some influence. Try and allow each person to speak and be heard. It may be best to be willing to challenge the present arrangement if it is not ideal for the future.

Try and agree roles and responsibilities for each group or subgroup. Try and allocate all the current work to report to one of these groups. You may be able to find co-ordinators for each subgroup right away.

You may be able to allocate most of the tasks above to groups.

At the end of this exercise, you may be able to ask each person in the room what part, if any, they are going to play in the next 6 months. You may be able to note this down on a flipchart.

<b>Fred</b>	Prospective farmer, will wait to see whether job as farmer arises before further involvement
<b>Jill</b>	Co-ordinator for land group, and will attend core group meetings
<b>Martha</b>	Just wants to write newsletter, no further responsibility. Will report to marketing group
<b>Shuvra</b>	Will attend core group, continued interest in overall plan and facilitation... etc

## Choosing a model

This exercise may indicate which model of CSA will best suit you. It will help if you have undertaken the vision and principles exercises as well.

List your 'stakeholders'. These are likely to be some combination of farmer /landlord/ community group/ consumers. Ask each to list their needs/wants , offers and fears.

For example

	<b>Wants/ needs</b>	<b>offers</b>	<b>fears</b>
<b>Farmer Bill</b>	Rent. Improved market for existing farm shop	5 acres of good land with parking. Machinery. Expertise.	Loss of privacy. Overworked, cannot provide labour for growing veg.
<b>Community group</b>	Vegetables not meat. Sense of involvement with land	Capital and revenue. Some volunteering, but not enough to manage 5 acres of land.	Unsure how to manage the project
<b>Farmer Flora</b>	Income	Skills and labour but has no land	Insecure or insufficient income. Too much work. Not interested in setting up and running a business, just want to grow veg.

This combination of stakeholders might suggest that the community group rents land and machinery from Farmer Bill and run the business which employs Farmer Flora to grow the veg.

You may be able to look at the table and suggest a model right away. You might need more than one enterprise. The Soil Association has a briefing sheet on models, and can advise. The core group might take the table and do further work to define a model.

This may lead on to selecting a legal structure in the future, such as a Community Interest Company, Industrial and Provident Society, Limited Company, etc.

## **Closing the day**

The facilitator should be careful to close the day well. You may have aroused some strong feelings and some people may have let go of hopes for the group.

You might allow each person in turn to speak to the whole group whilst everyone else listens, in a circle. They could say something they appreciated about others present, or something that is still on their minds.

The facilitator could summarise what has happened in the day. At the start of the day we intended to ..... We wanted this day because.....

During the day we have managed to agree on x,y,z, and form a workplan (or whatever). We have discovered that we need to do further work on a,b,c issues. I noticed that we worked really well together as a group in x,y,z respects (eg managed to speak honestly, managed to listen to difficult views, etc), which will help us progress together.

Some issues of concern that we need to revisit are.....

We have agreed that the next steps for us are .....

The next meeting will be chaired by ..... and is on ..... The following tasks should be completed by that date.

The facilitator might also ask the group for a through comment on what worked or didn't work about their facilitation.

## **Further help**

Please see [www.soilassociation.org/csa](http://www.soilassociation.org/csa) and get in touch if you need more help.

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