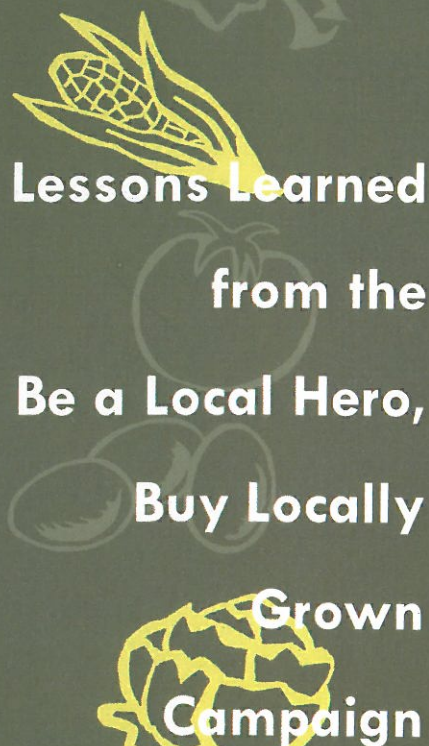
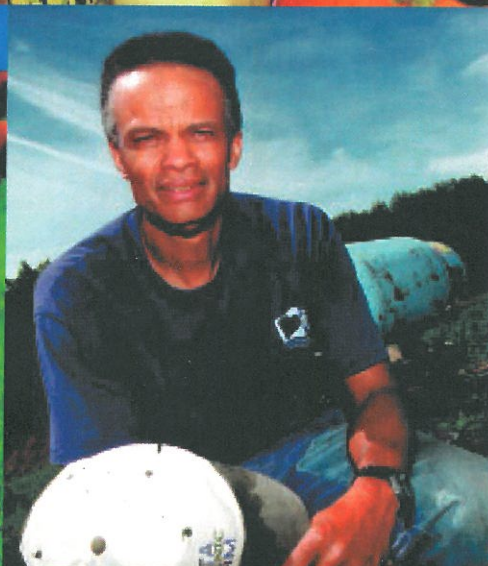
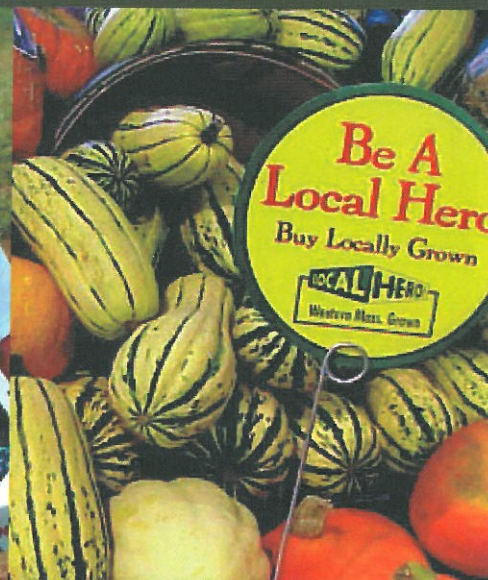


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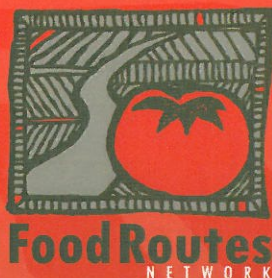


Lessons Learned
from the
Be a Local Hero,
Buy Locally
Grown
Campaign



Brought to you by CISA
and FoodRoutes Network

Co-written by
Mark Lattanzi, CISA,
and JoAnne Berkenkamp,
FoodRoutes Network



Introduction

Welcome to *Harvesting Support for Locally Grown Food: Lessons Learned from the Be a Local Hero, Buy Locally Grown Campaign!* In this toolkit, you will find a cornucopia of lessons about the mass media marketing campaign known as “Local Hero.” We hope it will inform your thinking and spark your creativity as you promote locally grown food in your own community.

Since Community Involved in Sustaining Agriculture (CISA) and FoodRoutes Network (formerly Fires of Hope) first teamed up in 1998, we have been engaging consumers in western Massachusetts in local agriculture and encouraging them to purchase fresh, locally grown food.

Eighty farmers, 36 grocery stores, 12 restaurants and dozens of farmers markets and farmstands are now part of the Local Hero campaign. Participating farmers have enjoyed rising sales while consumers are able to buy locally grown vegetables, fruit, meat, dairy and specialty foods at a growing number of locations across the region.

While Buy Local food campaigns are not right in all situations, we believe they can be an important tool for enhancing the vitality of locally and regionally based food systems. We are also committed to sharing our experience so that others may learn from both the successes and shortcomings of the Local Hero campaign—thus the Buy Local toolkit before you.

We would like to thank the W.K. Kellogg Foundation for their resolute support of this work. They have been a steady supporter of CISA and also enabled FoodRoutes Network to provide critical communications, fundraising and evaluation assistance during the initial years of the Local Hero campaign. Without support from Kellogg and our many other donors and supporters, the Local Hero campaign would not be what it is today.

We would also like to thank principle authors Mark Lattanzi of CISA and JoAnne Berkenkamp of FoodRoutes Network for their vision and tenacity in creating this toolkit. Nancy Matheson (National Center for Appropriate Technology—ATTRA), Gary Gumz and Phil Pritchard (Mountain Partners in



Agriculture), and Cathy Roth (University of Massachusetts, Extension) also reviewed earlier drafts of this document. We are grateful for their wise suggestions for improving it.

We hope you'll find this toolkit to be a thought-provoking and practical resource. We look forward to hearing from you as you promote locally grown food in your own community. Feel free to contact FoodRoutes Network at P.O. Box 443, Millheim, PA 16854, or CISA at 893 West Street, Amherst MA 01002-5001.

Here's to locally grown!

Tim Bowser
FoodRoutes Network
Millheim, PA

Annie Cheatham
CISA
Amherst, MA

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Chapter 1: A Brief History of Local Hero

Communities across the United States are struggling to keep farmers on the land and profitable. Over the years, myriad strategies have been used to sustain working farms. This toolkit explores one of them—the multimedia Buy Local campaign that Community Involved in Sustaining Agriculture (CISA) began in 1999.

Throughout CISA's campaign, we have worked in partnership with FoodRoutes Network. Now an independent, national, nonprofit organization, FoodRoutes Network (formerly Fires of Hope) promotes vibrant, community-based farming and food systems that are ecologically sound, economically viable, and socially just. CISA and FoodRoutes Network share a belief that Buy Local food programs can be an important tool for enhancing the vitality of locally and regionally based food systems and the communities in which they are based. We are also committed to sharing our experience with other communities so that you may learn from both the successes and shortcomings of our campaign. To that end, CISA and FoodRoutes Network have co-written this toolkit.

This chapter explains why CISA concluded that a Buy Local campaign was a key strategy for us. Also, as we wrote this toolkit, we recognized that CISA's circumstances—the demographics of our region, the composition of our farming community, and so on—probably differ from yours in some important ways. No doubt, the strategies and lessons included in this toolkit were influenced by our environment. So below, we highlight some key aspects of CISA's situation and encourage you to compare and contrast your situation with the one that gave rise to this toolkit.

With that said, a brief snapshot of our Buy Local program and a discussion of how CISA came to pursue a Buy Local program for the Pioneer Valley of western Massachusetts follow.

CISA'S BE A LOCAL HERO, BUY LOCALLY GROWN CAMPAIGN

Geographic Scope:

Three counties with a population of 670,000 covering 3,500 square miles.



Urban / Rural:

Largely rural with three metropolitan areas ranging in population from 30,000 to 150,000.

Farm participants:

Currently 80 farmers and their families, farming more than 13,000 acres. All practice some form of sustainable agriculture. Sixteen are certified organic.

Products:

Vegetables, small fruit, tree fruit, poultry, beef, lamb, milk, maple products, honey, and a small number of value-added products.

Retail Partners:

Three large supermarket chains (a total of 21 stores in our area), 15 smaller independent/family owned groceries, 12 restaurants, eight farmers markets and 127 farmstands.

Media and Outreach Efforts:

Multimedia campaign featuring radio and newspaper advertising, point-of-purchase (POP) materials, community events, Web site, Farm Products Guide and earned media coverage.

Campaign Budget:

Currently about \$80,000 in Buy Local expenditures per year, plus two full-time staff equivalents to manage the Buy Local program.

Launch Date:

June 1999

CISA and FoodRoutes

Network share a

belief that Buy Local

food programs can be

an important tool for

enhancing the vitality

of locally and

regionally based food

systems and the

communities in which

they are based.



CISA found that our Buy Local campaign has been a positive strategy to help farmers and spur consumers to buy locally grown food.

CISA'S PATH TO THE BE A LOCAL HERO, BUY LOCALLY GROWN CAMPAIGN

Our Farming Community

CISA operates in the Pioneer Valley of western Massachusetts, an area with a long tradition of agriculture and home to some of the best loamy soils in the world. Hundreds of small farms—ranging from one acre to several hundred acres—grow everything from fruits and vegetables to dairy, lamb and poultry. We benefit from a relatively large population of farmers who grew up on local farms, as well as newcomers who moved to the area to take advantage of its rural lifestyle and proximity to the cultural amenities provided by five world-class colleges.

Farmers here have a long history of experimentation and innovation. A diversity of crops and seasonal and year-round products allow us to promote farming activities 10 months a year. Yet, in spite of this diversity and bounty, farmers in our area struggle to survive.

The communities in the three-county region we focus on range from small, rural towns near the Vermont and New Hampshire borders, to college towns in the central part of the valley, to large, urban mill towns and cities to the south. Retailers include small natural food cooperatives as well as locally owned independent grocery stores and large regional and national chains. The relatively small size of our area—about 70 miles north to south by 50 miles east to west—makes delivery and distribution more manageable than in larger regions.

Our Organization

CISA started in 1993 as a broad-based coalition of farmers, consumers, Cooperative Extension agents, agricultural support professionals and nonprofit staffers, and regional and state political leaders working toward a common goal: the preservation of farming in our developing region of college towns and bedroom communities. CISA's founders wanted to ensure that our communities supported working farms that,

in turn, provide open space, practice soil and water conservation, and produce bountiful, fresh, local food. Our efforts included supporting farmer networks and various volunteer groups working to address the concerns of area farmers. We were a very small, grassroots organization; before our campaign came into view, we had only two part-time staff.

The Campaign Takes Shape

In 1998, the W.K. Kellogg Foundation awarded CISA a grant to fund a new Buy Local campaign. With that encouragement, CISA and our partners began planning what became known as the Be a Local Hero, Buy Locally Grown campaign.¹ Throughout this toolkit, we explore how our campaign came into being.

In short, we wanted to encourage local consumers to learn about and purchase local farm products. With that goal in mind, we worked with our farmer members and partners to plan our campaign strategy, began recruiting additional farmers, built relationships with retailers and the local media, and conducted market research.

With help from Kellogg Foundation staff and FoodRoutes Network, we attracted support from funders, including the U.S. Department of Agriculture's Natural Resources Conservation Service, the Lawson Valentine Foundation, the Kendall Foundation and the Cricket Foundation. CISA's strong partnerships with the University of Massachusetts at Amherst and the Massachusetts Department of Food and Agriculture provided additional resources and bolstered the foundation on which to build our campaign.

Campaign Results

CISA found that our Buy Local campaign has been a positive strategy to help farmers and spur consumers to buy locally grown food. For instance, consumer surveys conducted in January 2002 by CISA's market research firm (Penn, Schoen, & Berland Associates, Inc.) showed that:

- Seventy-eight percent of those surveyed recalled campaign advertising or

¹ Please note this endeavor is referred to the "Buy Local program" and the "Local Hero campaign" interchangeably throughout this toolkit. While CISA staff typically refer to it as "the Local Hero campaign," our Buy Local efforts go well beyond media and outreach activities to the many related program elements discussed in this toolkit.

remembered some aspect of the Local Hero message.

- Of those, 65 percent said that Local Hero ads influenced them to buy locally grown food.
- Eighty-six percent think it is important to keep running campaign ads so that people know about the benefits of locally grown food.
- Fifty-seven percent thought that the Local Hero campaign caused people to support other local retailers and businesses.

Also, surveys conducted by CISA staff showed that:

- Ninety-three percent of the participating farmers surveyed felt that the campaign provided “greater community awareness of local food systems.”
- Seventy-four percent of participating farmers surveyed reported that the dollar value of their sales increased in 2001 over the prior year, while a similar percentage felt the campaign provided them improved market access.
- Seventy-five percent of participating retailers surveyed reported that they purchased more local products in 2000 than in the prior year. Increases in the volume of local purchases averaged five to 10 percent.
- All of the responding, participating retailers purchased local farm products directly from farmers in 2000. Retailers purchased directly from two to 25 farmers each, with an average of 10 farms per store. Almost every retailer surveyed began purchasing from at least one additional farmer in 2000.

Challenges

While our campaign has enjoyed some promising results in its first three years, it continues to be a work in progress and we constantly seek ways to improve it. We have also faced a wide range of challenges—some we expected and some we didn’t. As a result, we encourage you to take a hard look at the challenges of this work and assess your capacity and commitment to make a Buy Local program work for you. Here are some of the biggest challenges we experienced:

- Media campaigns take skills that our staff initially had in very limited supply. CISA experienced a steep learning curve and needed outside advice and support, particularly early in our campaign.
- Media advertising and educational campaigns cost real money. CISA had to learn how to plan and budget well for activities that were new to us, set our expectations appropriately, and be diligent about finding ways to stretch our funds and engage partners. Long-term financial sustainability of the campaign remains an ongoing challenge.
- Working with grocery stores took us into a world that was relatively new to us. Learning to operate effectively in that environment was critical for moving large quantities of food from farmers to consumers.
- Our emphasis on communications work notwithstanding, our Buy Local program demands a wide range of skills: coalition building; community organizing; a commitment to working with sometimes reluctant farmers, retailers and consumers; diplomacy with funders; and political savvy to deal with regional, state and federal agricultural leaders. A sense of adventure and a good sense of humor are a must.

As you can see, Buy Local programs offer potential, but their success is far from given. As you read through this toolkit, we encourage you to explore your aspirations, the needs of your community, and the relationships, skills, partnerships, and financial and other resources you bring to this task. Such an assessment will help you make a sound decision about whether or not organizing a Buy Local program is right for you.

A FINAL NOTE

The most important piece of advice we can give you is this: the success of a Buy Local program hinges not only upon a great slogan and a zippy logo. It also hinges on your ability to work effectively as community organizers, bringing diverse and sometimes wary participants and partners together to work toward the common goal of ensuring the future of agriculture in your region. The task is great, but the rewards can be greater. Good luck and have fun!



*Ninety-three percent
of the participating
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Chapter 2: How to Use This Toolkit

We hope this you will find this Buy Local toolkit thought-provoking and informative.

As you know, Buy Local food programs are multifaceted endeavors. They involve a variety of components, many of which take place simultaneously and impinge on one another. In this toolkit, we have tried to touch on each component that has been central to our Buy Local program. To bring some method to the madness, we've devoted one section of this toolkit to each of those major pieces. You'll find those pieces outlined below.

Throughout the toolkit, we've included a variety of Buy Local marketing materials, budgets, interviews, survey tools, worksheets and other resources. At various points, we highlight key aspects of our own history to acquaint you with the path our campaign has taken. In some chapters, we also provide discussion questions to help you, your participants and partners talk through these issues.

We've written this toolkit with the hope that other communities will benefit from our successes—and our failures—and that by hearing about our experiences, you will gain a fuller sense of what to expect from your own Buy Local program. We've tried to be candid and to share the many lessons Community Involved in Sustaining Agriculture (CISA) has learned along the way.

You'll also find a few highlights from Berkshire Grown, another Buy Local effort in the nearby Berkshire Mountains. Berkshire Grown has operated with a much smaller budget than our own and has its own unique experience to share.

Also keep in mind that what works for CISA may not be the best fit for you. Be sure to pay close attention to your own community's hopes and circumstances. Listen. Think ahead. Be creative. And explore how you can use this toolkit to help yourself, your staff and your stakeholders set the stage for a high-impact Buy Local food program.



THE CHAPTERS AHEAD

Each chapter of this toolkit explores a key facet in the development and implementation of a Buy Local food program like CISA's. We've tried to break the work down into discrete pieces so that you can find your way through the toolkit easily. You can skip ahead as you like or read the toolkit as arranged.


Planning and Budgeting (page 7)

Thoughtful planning and budgeting are essential to the development, implementation and sustainability of a Buy Local food program. In this chapter, we explore key issues to plan for, encourage you to assess the strengths and weaknesses you bring to your Buy Local program, and discuss the costs you might anticipate. We also share CISA's experience with campaign planning and outline the strengths and limitations we faced as our campaign got rolling. You'll also find a find an illustration of the key milestones we experienced as our campaign took shape, as well as discussion questions you can use in your planning.

Funding Your Buy Local Program (page 15)

In this chapter, you'll find a brief discussion of various avenues for funding a Buy Local program. We share CISA's experience with fundraising and revenue-generation, and explore some of the hidden costs of raising funds.

*Thoughtful planning
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Local food program.*



Partners can
contribute fresh
ideas, people to help
get the work done,
and political, financial
and moral support.

Working with Farmers (page 19)

The folks who grow locally grown food are likely to be at the heart of your Buy Local program. Engaging farmers early in the design of your program and working well with them over time are keys to success. In this chapter, you'll find a host of ideas for recruiting farmers and maintaining fruitful relationships with this key constituency.

Partnerships (page 25)

Partnerships with like-minded organizations can help broaden the impact of your campaign. Partners can contribute fresh ideas, people to help get the work done, and political, financial and moral support. Here we give a brief summary of the partnerships that CISA has found important and provide discussion questions to help you explore how partnerships can strengthen your campaign.

Market Research and Message Development (page 27)

CISA's market research with local consumers was the foundation of all of our communications work. Market research can help you understand your audience, hone your message, and frame your communications efforts effectively. This chapter shows you how CISA approached our research, explores the basic steps of market research and message development, and provides advice from CISA's market research firm. We've also included a list of reference materials for those who want to learn more.

Designing Your Communications Plan (page 67)

A clear, comprehensive communications plan will help you be strategic and better manage your marketing and outreach efforts. The development of your communications materials and relationships with the media are just a few of the key aspects to address. This chapter explores the eight basic steps of communications planning and offers a cornucopia of tips, resources and discussion questions to help you plan your communications strategy.

Communications Tools and Tactics (page 79)

Once you've researched your market, honed your message and developed a

communications plan, it's time to develop your marketing and outreach tools. Here we explore some of the tools and tactics CISA has used—from radio ads to Local Hero stickers to signs on the sides of buses. We also share the lessons we learned about each of these tools, and offer tips about news releases, public service announcements (PSAs) and other vehicles for reaching your community.

Local Food in the Marketplace (page 87)

Retail venues are essential for bringing locally grown products to consumers. Here we explore some of the many retail venues you might work with and share the ups and downs of CISA's experience with grocery stores large and small, institutional buyers, restaurants and others.

Evaluation (page 99)

It may be tempting to think of evaluation as something to do "when it's all over" or "when we get around to it." For CISA, evaluation has been instrumental in our ability to keep improving the campaign and attract new sources of funding, participants, publicity and community support. This chapter explores how you can make evaluation work for your Buy Local program.

Launching Your Program (page 125)

What will you need to have in place before you formally launch your Buy Local program? Here we discuss some of the prep work that you should anticipate and share our advice about using community events to launch your Buy Local campaign.

Keeping It Going (page 129)

Significant time and effort are needed to plan and launch a Buy Local food program. And once it is off the ground, additional time, money and energy are needed to keep the program vibrant. Here we explore what it takes to keep a Buy Local program humming.

TO SUM UP...

CISA's experience is but one approach to a Buy Local food campaign. We at FoodRoutes Network (formerly Fires of Hope) and CISA hope that by sharing this experience, we will help you plan and launch an even more successful program. We hope you'll enjoy using this toolkit and welcome your feedback.

Chapter 3: Planning and Budgeting

This chapter tells the story of how Community Involved in Sustaining Agriculture's (CISA) Buy Local program came into being and how we approached planning and budgeting. These intertwining steps are perhaps the most complex and important ones you will need to take. Our process was far from perfect, but we hope our story will give you some insights that you can apply to your own planning and budgeting efforts.

In this chapter, we:

- Identify key issues to plan for
- Share CISA's experience with planning
- Outline some of the key milestones in our program's evolution
- Encourage you to take stock of your strengths and limitations and share a few of our own
- Discuss costs and budgeting

PLANNING YOUR BUY LOCAL FOOD PROGRAM

While your Buy Local program will undoubtedly have features unique to your situation, we found it helpful to consider four questions when planning a campaign:

- What are your goals?
- What strengths do you bring to your work?
- What limitations do you have?
- What strategies will best enable you to pursue your goals?

As we discuss below, CISA found that clarifying our goals was harder than we thought it would be. But getting that clarity enabled us to move forward with greater purpose and focus. We also learned (sometimes the hard way) that it's important to take stock of your strengths and limitations before taking on an ambitious project like a Buy Local campaign. Only after CISA's campaign was off and running, did we realize how much we didn't know. Those first few months of the campaign really taught us where our knowledge gaps were. And



lastly, we learned the importance of a well-organized game plan for figuring out how to move toward our goals.

Based on our experience, the following issues are important ones to plan for. Each of these topics is discussed at length in the remaining sections of the toolkit, as noted:

- Developing budgets and raising funds (chapters 3 and 4)
- Recruiting and working with farmers (chapter 5)
- Engaging partner organizations and other stakeholders (chapter 6)
- Recruiting and working with retailers, restaurants and other campaign participants (chapter 10)
- Developing campaign policies (chapters 5 and 6)
- Identifying your audience and developing your message (chapter 7)
- Developing your communications plan and materials (chapters 8 and 9)
- Building relationships with the media (chapter 8)
- Evaluating your program and finding ways to improve it (chapter 11)
- Launching your program (chapter 12)

... it's important to take stock of your strengths and limitations before taking on an ambitious project like a Buy Local campaign.



KEY MILESTONES IN THE DEVELOPMENT OF THE BUY LOCAL CAMPAIGN

August 1998:	Received W. K. Kellogg Foundation funding for the campaign; funds from other sources followed. Began sporadic campaign planning.
Early 1999:	USDA's Natural Resources Conservation Service stepped up to the plate with major grant support.
January 1999:	Conducted initial message research. Started campaign planning in earnest.
January 1999:	Sent mass mailing to recruit farmers.
February 1999:	Hired campaign coordinator (not a minute too soon).
Spring 1999:	Hired local public relations consultant.
Spring 1999:	Developed slogan and logo (the logo selection process was grueling!).
Spring 1999:	Printed banners, POP materials, and more.
Spring 1999:	Produced radio ads.
June 24, 1999:	Launched our campaign (ready or not, here we go!!!!).
Summer 1999:	Started running radio and newspaper ads. Distributed POP materials to retail stores.
Summer 1999:	Did our 25 th public appearance at a fair, festival or event (time to scale back).
Summer 1999:	Stop & Shop, a major grocery store chain, joined the campaign (yeah!).
Summer 1999:	Staff began doing media interviews and radio appearances.
Winter 1999:	Performed first independent consumer awareness surveys. (Got great awareness data! We're doing well!)
Winter 1999:	Conducted first annual farmer and retailer surveys.
Winter 1999:	Produced brochure with 1999 evaluation results. Massachusetts Commissioner of Agriculture endorses our campaign as "outrageously successful" (yippee!).
February 2000:	Signed up our 10 th local, independent grocery partner.
Summer 2000:	Signed up our 30 th farmer.
Summer 2000:	Launched our restaurant program.

- Maintaining the program and keeping it fresh (chapter 13)

The Evolution of CISA's Be a Local Hero, Buy Locally Grown Campaign

By the time CISA launched its campaign in mid-1999, we had been talking about conducting a Buy Local program for several years. We did initial market research in 1997. Then, in August 1998, we received a major grant from the W.K. Kellogg Foundation, allowing the campaign idea to become a reality.

Things began to take off in January 1999. In the space of six months:

- We hired a campaign manager, started formally recruiting farmers, coordinated with retailers, and contacted members of other nonprofits in the agricultural sector.
- We hired a market research firm to help us hone our audience and messages.
- Our communications consultant came up with the Be a Local Hero, Buy Locally Grown part of our slogan.
- We hired a local public relations firm, finished our graphic design work and settled on the full slogan: Be a Local Hero, Buy Locally Grown. It's fresh, it's convenient and it helps the local economy.
- We organized a launch event, printed banners, arranged for bus advertising signs, developed a mass mailing piece, issued news releases, printed point-of-purchase (POP) materials, and so on.
- On June 24, 1999 we launched our campaign with an event at which we officially introduced the Be a Local Hero, Buy Locally Grown campaign to our community.

As you can imagine, the six-months leading up to our campaign launch were quite a whirlwind. Our experience was that six months was not enough. Nine to 12 months would have been more realistic given what we were trying to do. In upcoming chapters, we talk at length about planning for each key component of a Buy Local food campaign. In the sidebar (location), we provide some discussion questions to help you sort through your own planning needs.

WHAT STRENGTHS DO YOU BRING TO YOUR BUY LOCAL PROGRAM?

Developing our Buy Local program was a big adventure for CISA. We drew upon every asset we had to get it off the ground. Before you embark on your campaign, we would encourage you to take stock of what you have going for you and what areas need strengthening. Taking stock in this way can help you see your assets (which are, perhaps, more numerous than you give yourself credit for), while also elucidating the gaps you need to address.

For instance, CISA had the following things in our favor as we embarked on our Buy Local program:

- **We knew our community.** CISA was created by volunteers from many different organizations in the Pioneer Valley. Volunteer working groups had been in place for five years prior to the launch of the Buy Local campaign. We had solid ties with local farmers and other community members concerned about agriculture.
- **We had good connections with retailers.** We had positive relationships with some of the family-owned grocery stores in our area as well as one of the larger chains.
- **We had experience with a smaller, successful local marketing project** that created a local brand for a dairy farm cooperative (Our Family Farms).
- **We had funding** from the W. K. Kellogg Foundation, a long-time supporter of CISA's work. We received start-up funds for the Local Hero campaign from Kellogg in 1998, as well as a second campaign grant in 2000. That support allowed us to use a higher budget model and to get the expertise we needed.
- **We had help with fundraising.** Our program officer at Kellogg, Oran Hesterman, and the staff and consultants at FoodRoutes Network (formerly Fires of Hope) were committed to CISA's success and helped us approach other funders.
- **We received technical assistance** from FoodRoutes Network that was integral to the market research, communications and evaluation of our campaign. They pushed us to take all three to new levels.

- **We had leadership.** CISA had a small, but committed staff and a board of directors made up of dedicated individuals from agricultural, educational, retail and nonprofit organizations who wanted the Buy Local program to succeed.
- **We had the chance to be a big fish in a small pond.** By nonprofit standards, we had a large budget to conduct a campaign in a relatively small geographic area with a modest population. We also live in an area with fairly reasonable media costs, so our communications budget could go a long way.

What are your strengths? As you learn more about creating and implementing a Buy Local campaign, consider keeping a list of your



KEY MILESTONES IN THE DEVELOPMENT OF THE BUY LOCAL CAMPAIGN (CONTINUED)

- | | |
|----------------|---|
| Winter 2000: | Seventy-five percent of participating retailers report their volume of local products purchased increased by 5–10 percent over 1999. |
| Spring 2001: | Decided to drop the bus signs and beef up newspaper ads. |
| December 2001: | Signed up our 62 nd farmer. |
| January 2002: | Consumer poll shows that 78 percent of the consumers polled are aware of the Local Hero campaign. Of those, 65 percent were influenced by locally grown food. |
| April 2002: | Signed up our 80 th farmer. |



GOOD PLANNING:

- Clarifies your goals and aspirations
- Helps you anticipate financial, staffing and partnership needs
- Helps you leverage your strengths and address the weaknesses of your organization and partnerships
- Helps you manage your program
- Positions you to weather the ups and downs that your program will surely experience

organization's strengths and assets. It's helpful to have a realistic inventory of assets that you can leverage when approaching partners. It can also be a nice reminder of your better qualities when you are feeling overwhelmed.

WHAT LIMITATIONS DO YOU HAVE?

Perhaps more challenging than assessing your strengths will be a thorough inventory of your limitations. Taking stock of your limitations can help clarify where you need to bolster your capacity and position you to find the appropriate people—partners, volunteers, consultants, etc.—to help address them.

For instance, CISA had a variety of limitations that hindered the planning and implementation of our campaign. While none were so big as to incapacitate us, taken as a whole they show that we were a young organization struggling to create and implement a very sizable multimedia and community-building project.

Here are some of the limitations CISA had as our campaign took shape:

- **We lacked a clearly defined organizational structure.** When we launched our campaign, CISA was in a state of transition. During the prior four years, most of our work was accomplished through eight volunteer, community action groups. As we began planning for the Local Hero campaign, we shifted from a short-term community project to a permanent organization with 501(c)3 status. We were figuring out which of the action groups' activities should and could

be continued, and what staff and other resources we would need to maintain and support them. As we planned the campaign, staff, board and CISA members were still in the midst of working out a new way of operating together.

- **We lacked communications expertise and had a very small staff.** Nine months before CISA launched its campaign, we had only two part-time staff—an executive director and a program assistant—with very little communications experience. To compensate for this, we initially relied heavily on outside consultants.
- **We didn't have an implementation plan** for the campaign. We hired graphics artists, public relations specialists, and others to do individual tasks, such as developing radio spots and newspaper ads. However, we weren't able to find a communications consultant who could help us develop a broader plan that would enable us to anticipate and manage the overall process.
- **We needed more planning time.** Nine to 12 months would have been much better than the six months we gave it.
- **We weren't prepared for the spotlight.** Once we started doing a lot of media work, CISA was thrust into the public eye in a whole new way. We received many calls from the media and soon realized that responding to them takes a lot of staff time. We also learned how important it is to be clear about the message your spokespeople present to the media. Lessons learned: Be well prepared for greater attention and scrutiny. Be disciplined about what your staff, your board members and your partners say. Avoid winging it.
- **Our campaign policies weren't clear enough.** For instance, we needed more explicit policies about what it meant to be a campaign participant. In the absence of written policies, staff, board, farmers and retail participants had differing assumptions and expectations about the benefits and obligations that came with joining the campaign.
- **We didn't know how to evaluate the campaign.** We had done very little formal evaluation before the campaign. Spurred on by the Kellogg Foundation, we worked

with an evaluator from FoodRoutes Network to design and conduct our evaluation. Our evaluation later showed what impact we were having and where we could make improvements. And it provided outcome data that funders expected. Without that data, we might not have had a second year. We didn't anticipate that evaluation could be such a critical tool, but we found that we needed some outside coaching to make it happen.

- **The campaign was swamping some of CISA's long-running programs.** Some members were disappointed when older programs took a back seat. It was easy to show most people that the campaign was important, but they wanted us to continue all other programs too. We didn't have the staff or financial resources to launch a new campaign and maintain older programs.
- **CISA had no experience satisfying expectations from people outside our community.** Kellogg and other funders wanted their investment to result in a highly effective campaign, but we were focused on the needs of the Pioneer Valley and didn't always understand the national philanthropic arena our Buy Local program was part of.
- **We had not clearly defined the roles of staff, consultants, board members, funders and partners.** We needed more explicit agreements about who was in charge of what, who got to give input about what, and how decisions would be made. For instance, the process of choosing our logo vividly illustrated our need for clear, agreed upon protocols for making potentially contentious campaign decisions.
- **We were sometimes overwhelmed by experts and friendly advisors.** We often felt torn by conflicting advice from consultants. We also had many different people calling us and telling us what we should do. While we tried to take advantage of good ideas, we had to get good at telling people, "Sorry. That's a great idea, but we can't take that on right now."
- **We had some unrealistic expectations about the costs of advertising** in major

media outlets and hiring communications consultants. Both were more costly than we expected.

We hope that you will also identify the limitations you bring to your Buy Local work. That assessment will help you make better decisions, set more realistic expectations, identify needed partners and plan ahead for the challenges that are sure to come.



DISCUSSION QUESTIONS: PLANNING YOUR BUY LOCAL PROGRAM

As you plan your Buy Local food program, consider the following questions:

- What are your organization's hopes and intentions? How would your partners, participants and community members answer this question?
- Are your board, staff and membership base committed to the campaign as a way to pursue your goals??
- What are your strengths and limitations? What don't you know that you need to know to be effective?
- Who can help you fill those knowledge gaps (preferably in a way that also builds your own capacity)?
- Who should be involved in your planning effort?
- What issues do you need to plan for?
- How much time will you need to plan?
- How will launching a Buy Local program affect your other programs?
- What unexpected developments could get in your way? How can you prepare for the unexpected?
- Who will be involved in making key decisions? How will you handle potential disagreements?
- Do you have the human and financial capacity to design and run the campaign you're envisioning? If not, how will you and your partners obtain the resources you need?



COMMUNICATIONS CONSULTANTS? STAFF? SOME OF BOTH?

CISA's former Executive Director, Margaret Christie, reflected on CISA's early reliance on communication consultants:

CISA might have benefited if we had put more money into a campaign coordinator's salary, raising it by 25 to 35 percent, and relied less on consultants.

However, folks with skills such as marketing, advertising, media relations and graphic design could command more money at a for-profit business than nonprofits are likely to pay. The need for CISA to have some of those skills on staff didn't escape us at the time, but we were unwilling to make the jump in salary needed to obtain them. We had to balance the cost of obtaining those skills with the existing staff salary structure and the possibility that staff salaries might be viewed as inflated relative to what farmers make. I think the latter is always an issue in organizations that have an underpaid constituency.

Nevertheless, I think we probably could have built our own capacity faster and relied less on consultants if we had offered a higher salary for the new campaign coordinator position.



- Explore a variety of different avenues that could help you reach your goals
- Rank your program priorities
- Identify potential costs (perhaps organized as "essentials" and "wish list")
- Assess the financial and in-kind resources you have in hand
- Assess the resources that current and potential partners could bring to bear
- Identify local, regional, state and national sources of funding and other support
- Set fundraising goals for immediate, short- and long-term needs
- Make decisions about how you can best use the resources you have

Your Buy Local program will be unique and, as a result, so will your budget. For instance, CISA emphasized media-based communication and much of our campaign budget is dedicated to newspaper, radio and other forms of advertising. Media costs vary greatly from one community to another. While your costs will surely differ from ours, we share our budget as a point of comparison as you explore the potential costs of your program.

The Cost of CISA's Campaign

To the best of our recollection, our expenditures for the first three years of the Buy Local program were as follows:

BUDGETING FOR YOUR BUY LOCAL FOOD PROGRAM

We found that budgeting can be both an art and a science. It bridges the gap between your dreams and your financial reality. Unfortunately, in the nonprofit world we often struggle to pursue our dreams on a shoestring budget.


Budgeting for your Buy Local food program will be closely intertwined with your program planning. Your budget process may include the following steps:

- Outline what you hope to achieve

EXPENSES	1999	2000	2001
Pre-campaign market research	\$25,000	\$0	\$0
Graphic design services	\$26,500	\$1,500	\$500
Design of POP materials and newspaper ads, and coordination of radio and newspaper ad placements	\$74,500	\$0	\$0
Development of radio ads	\$7,600	\$0	\$0
Photographer	\$4,000	\$4,000	\$2,000
Purchase of newspaper ad space	\$35,000	\$35,000	\$40,000
Purchase of radio ads placements	\$30,500	\$30,500	\$17,000
Bus advertising signs	\$16,000	\$16,000	\$0
Point-of-purchase materials	\$2,000	\$2,000	\$2,750
Recipe booklet, cards and holders	\$0	\$0	\$1,400
Bumper stickers	\$1,000	\$0	\$1,000
Farmers market promotions	\$0	\$0	\$250
Newspaper subscriptions	\$0	\$150	\$200
Events	\$4,000	\$5,500	\$500
Post-season consumer survey	\$10,000	\$10,000	\$10,000
Interns	\$2,000	\$1,500	\$3,000
Campaign “summit” meeting	\$0	\$0	\$2,000
Total	\$238,100	\$106,150	\$80,600

While your costs will surely differ from ours, we share our budget as a point of comparison as you explore the potential costs of your program.





Funders will be receptive to your ideas if you present a well-designed plan and can speak convincingly about why your plan makes sense and merits funding.

CISA also devoted roughly three full-time equivalent staff positions to the campaign (for oversight and management, communications, evaluation, participant recruitment and relationship building, oversight of retail activities, Web development, and events). FoodRoutes Network also provided a public relations consultant in 1999 and a fundraiser who helped with the campaign. Our FoodRoutes Network evaluator spent four to six days of consulting time on our campaign evaluation in each year.

As you look over these figures, you can see how CISA's costs changed over time. For instance:

- The first year of CISA's campaign was the most expensive, since we incurred all of our up-front market research and materials design costs early on. We also had few staff initially and relied heavily on outside consultants.
- We shifted some functions, like placing newspaper and radio ads, in-house when we added staff with more marketing experience.
- We adjusted our communications budget after evaluating which advertising channels were most effective. For example,

our post-season tracking surveys (see chapter 7) showed that bus advertising signs had low public recognition. We eliminated them in the third year and redirected those funds to newspaper ads, which were identified as more effective.

- Costs for promotional event fell after our two kickoffs (the initial campaign kickoff in 1999, and a restaurant kickoff in 2000).
- We also became savvier about what we hired consultants to do and the terms under which we engaged them. For instance, we required specific budgets and proof of actual costs incurred rather than less clearly defined service contracts.
- We eliminated some outside photography expenses when we purchased a digital camera.

As you think about your Buy Local program, take the time to explore what you want your program to look like, then estimate costs, and fundraise to meet your plan. Funders will be receptive to your ideas if you present a well-designed plan and can speak convincingly about why your plan makes sense and merits funding. Having evaluation data to show your results can be a big help as you enter your second year.



DISCUSSION QUESTIONS: BUDGETING FOR YOUR CAMPAIGN

- What will it cost to effectively pursue the campaign that you envision?
- What are your high- and low-budget scenarios?
- What are your best- and worst-case fundraising scenarios?
- How might your partners and participants help shoulder some of the costs?
- Where can you economize?
- How might your cost changes from one year or season to the next?
- How much time will you need to develop a realistic budget?

Chapter 4: Funding Your Buy Local Program

There are many avenues for funding Buy Local programs. Among the ones Community Involved in Sustaining Agriculture (CISA) has pursued are foundation and government grants, program fees, membership dues, major (and not so major) donors, events and merchandise sales.

In this chapter we:

- Share our experience with different fundraising tactics
- Explore some of the “hidden costs” of raising money
- Provide a list of fundraising reference materials

GRANTS

Foundation funding has been the most important source of funding for CISA’s campaign. We had the good fortune of securing funds through the W.K. Kellogg Foundation to get our Buy Local campaign off the ground. Having one solid funder behind the campaign certainly helped attract others. The Massachusetts Department of Food and Agriculture, Lawson Valentine Foundation, Kendall Foundation, Crickett Foundation, U.S. Department of Agriculture’s Natural Resources Conservation Service, and Massachusetts Society for Promoting Agriculture have all supported the campaign in the first, and in some cases, subsequent years. CISA has also received gifts from a director of the Charles Stewart Mott Foundation.

Foundations are likely to be an important funding source for most Buy Local programs, particularly in the early years. CISA would not be here today if not for foundation support. That being said, it is also important to diversify your funding base early, when you have the foundation support to cushion you. Like the parable of the grasshopper and the ant, it is better to start saving for the long cold winter when the sun is shining and the food is plentiful. Long-term sustainability of our campaign is something that CISA continues to grapple with.



Hidden Costs


Foundation and government funders differ on how much they ask of their grantees in terms of report writing, site visits, deliverables and trips to conferences or other meetings. At the very least, you need to spend staff, consultant or volunteer time researching, producing and refining a grant proposal. You will also need to spend time working and coordinating with funders to develop and maintain a working relationship.

PROGRAM FEES

Our Buy Local program generates income from program fees paid by our campaign participants. CISA charged farmers \$35 a year in the first three years of our campaign. Retailers and restaurants were charged \$50 a year. This low pricing structure was meant to enable all interested farmers, retailers and restaurants to join. These fees seemed an appropriate amount to charge, at least in the first year. In hindsight, however, CISA would have been wise to raise our fees thereafter to help make the campaign more financially sustainable.

In some instances, the low fee also enabled farmers with very, very small operations to join the campaign. This can be seen as inclusive, but it also created some situations

Like the parable of the grasshopper and the ant, it is better to start saving for the long cold winter when the sun is shining and the food is plentiful.



where part-time or very low-level farmers received benefits out of proportion to their impact on the local marketplace. You may want to consider whether working with farmers with net farm incomes in the triple digits is worthwhile. CISA now charges farmers \$100 per year and restaurants and retailers \$150, and our fees will likely increase in the years ahead.

Hidden Costs

Think of the services and materials you offer to your farmers and other participants. What is the approximate dollar value of those services and materials? Does their fee cover some meaningful portion of those services? If not, how will you pay for those services now and in the future?

MEMBERSHIPS

If you are a membership organization, your members can be a steady source of support your campaign. About six percent of CISA's annual organizational budget comes from member dues. We now have about 300 members who contribute anywhere from \$10 to \$500 each, per year.

However, we have found it challenging to expand our membership. This is partly due to the time required to recruit and maintain members. It may also be due to the confusing message membership recruitment might give consumers: we are asking them to buy locally grown, and they are doing so. Then we ask

them to join our organization, but many may think that buying locally grown is enough. As a result, CISA has elected to de-emphasize membership and focus on larger individual donations.

Hidden Costs

You might have shared our experience that member recruitment takes a lot of time. You have to develop a mailing list, create and send out membership solicitation letters, develop and manage contributing members in a database, send out renewal and special appeal letters, and develop activities, policies and benefits for members.

Also, many organizations offer “gifts” to encourage people to join. These tokens cost money. Conventional fundraising wisdom says that people will join your organization because they share your values. Many will even refuse the gifts, hoping to save the organization the time and money it costs to send them out.

DONORS

Donors, as distinct from members, are individuals, businesses or institutions that make large donations to fund your programs. They sometimes start as members and “upgrade” to donors, but it is often more efficient to identify them early on and solicit them directly. For CISA, potential donors include banks, agriculture-related businesses and institutions, and community members of



ENHANCING YOUR FUNDRAISING POTENTIAL

- Ask local restaurants and retail stores to donate food for events.
- Recruit sponsors who can help shoulder some of the cost of community events.
- Explore the possibility of printing publications in large quantities through local newspapers. Offer a sponsorship in exchange for help with defraying printing costs.
- Use fundraising events to attract and provide benefits to members, such as discounts, coupons, maps to stores that sell locally grown food, your growers guide, etc.
- Use volunteers whenever possible.
- Make sure that for-profit businesses understand that they can write off donations of space or products to nonprofit organizations.

means who have an interest in agriculture, open space or the environment.

We've found that donor cultivation is more an art than a science. Careful planning and clear goals are essential, as is the willingness of board members and participants to ask other community members to support your work.

Hidden Costs

We find that donor solicitation takes a great deal of staff time. Tasks involved in soliciting donors include:

- Developing a list of potential major donors
- Creating and sending a major donor solicitation letter
- Calling each potential donor and requesting a visit
- Recruiting and training board members or others who will be going out on donor visits
- Visiting donors
- Developing a database for major donors
- Processing donations and sending thank-you notes and gifts
- Maintaining contact with donors

Note that we mentioned gifts. CISA creates a thank-you package featuring some of our farmers' products (jams, jellies, wine, maple syrup, honey, etc.) for donors who contribute *significant* amounts of money to our campaign.

EVENTS, MERCHANDISE AND OTHER "RETAIL" ACTIVITIES

We've found that major public events like farm tours, local food dinners, silent auctions and so on, have substantial fundraising potential. When planning these events, it is important to:

- Take a long-term view of the event's potential. In our experience, major events may not raise substantial funds in the first few years, but could have good potential once the event is established and your systems are in place.
- Approach your participants about helping defray the costs of events. Restaurants are usually happy to donate dishes featuring locally grown food that show



TIPS FOR WORKING WITH FOUNDATIONS AND OTHER FUNDERS

- Send them updates, news articles and promotions for program events on a regular basis.
- Call them regularly to maintain the relationship.
- Share anecdotal stories about the campaign.
- Do quality evaluation of your work and send the results to your funders.
- Invite funders to special meetings and major events, regardless of whether you think they will attend or not.
- Encourage site visits during the growing season to allow your funders to see your campaign in action.

off their skills at using these products. Farmers might like to show off their farms to the general community and expand their customer base.

- Ask your board and volunteers to perform as many of the organizing and implementation tasks you can. When hosting a forum or putting on a farm tour and feast, the need for helpers is acute. Plan for more volunteers than you think you'll need—they will all come in handy.
- Consider collaborating with other organizations to increase your income and share the workload. Collaborations also help you utilize existing infrastructure without having to incur the expense.

Selling things like campaign T-shirts and hats may be a good idea if you have the funds to tie up in inventory. We found that they are helpful in spreading our message, but not in increasing our bottom line. It is always a good idea to have your farmers or other spokespeople wear a campaign hat or T-shirt when talking to the media. You may also wish to purchase products from your farmers at wholesale cost and sell them at events or fairs. You could also partner with them in a concession stand.

Hidden Costs

Events have the potential of bringing thousands, if not tens of thousands, of dollars into your organization. But remember to get as much volunteer help as possible and to

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fundraising potential.



keep track of the staff time you are committing. And if you are paying a staff person to coordinate large-scale events, take a hard look at the time it will take. What is your organization's "net" after accounting for staff time and expenses?

SHOULD YOU HIRE A FUNDRAISING CONSULTANT OR DEVELOPMENT DIRECTOR?

Donor management, event planning and thank-you-ing take time and attention. You may determine that staff hours are precious and that you would rather use them for program development and hire a

professional fundraiser. Many options are available.

You can hire a professional fundraising consultant (part-time or full-time). You can hire a staff person to work on fundraising. Or, you can have some combination of the two (allowing for some training of staff by the consultant). It all depends on what you can afford. Be aware that fundraising plans are long term and that a development consultant may need one to two years to identify funding sources, solicit them and work on donor and member recruitment before results will be evident.



RESOURCES: FUNDRAISING

Books

The Foundation Center's Guide to Proposal Writing, The Foundation Center, 2001.
To order publications from The Foundation Center, call (800) 424-9836 or (212) 620-4230, or visit www.fdncenter.org.

Fundraising for Social Change, Kim Klein, Chardon Press, 2001.

The PRI Directory: Charitable Loans and Other Program Related Investments by Foundations, The Foundation Center, 2001.

Raise More Money: The Best of the Grassroots Fundraising Journal. Kim Klein, Stephanie Roth, editors, Jossey-Bass Publishers, 2001.
To order publications from Jossey-Bass, call (877) 762-2974, fax (800) 597-3299, or visit www.josseybass.com.

Selling Social Change (Without Selling Out): Earned Income Strategies for Nonprofits, Andy Robinson, Jossey-Bass Publishers, 2002.

Storytelling for Grantseekers: The Guide to Creative Nonprofit Fundraising, Cheryl A. Clarke, Jossey-Bass Publishers.

The Wilder Nonprofit Field Guide to Fundraising on the Internet, Gary Grobman, et al. Available from the Amherst A. Wilder Foundation Publishing Center, (800) 274-6024

Online

The Management Assistance Program for Nonprofits provides a Free Management Library on its Web site, www.mapnp.org. See the fundraising section of the Management Library for materials and links to a wide variety of resources.

Chapter 5: Working with Farmers

Your relationships with farmers are likely to be the foundation of your Buy Local effort. Engaging farmers and working with them effectively requires patience, willingness to listen, tenacity and enthusiasm for building relationships. Good community organizing is essential to working effectively with those who provide the most basic component of your program—locally grown food.

This chapter explores some of the key aspects of recruiting and working with farmers as part of your Buy Local program:

- Developing shared expectations
- Suggestions for recruiting farmers
- The application process
- Grower meetings
- Maintaining good relationships

DEVELOPING SHARED EXPECTATIONS

Community Involved in Sustaining Agriculture (CISA) has found that clarity—about our goals, our strategies, the potential benefits of our campaign, etc.—is the foundation for strong, vibrant relationships with our farming community. Before you start formally recruiting farmers, it's essential that you can succinctly articulate your organization's values and the intentions and strategies of your Buy Local program. You also need to have a clear sense of how you intend to engage with campaign participants and the factors that might motivate or deter their participation. Actively seek input from potential participants and then take it to heart.

Even the words you use to describe the campaign are important. For instance, CISA has found that people use expressions like “campaign” and “communications” differently. You may think you're being clear when you use such words, but you may find out later that some people heard a different message than you thought you were giving. Being explicit and transparent in your communications with prospective participants is key.



Many participants also will be engaging in a campaign like yours for the first time, so it is incumbent upon you to articulate clearly what being a participant means. That includes being clear about both potential benefits and obligations of participation—and clear about what the roles of your organization and your partners will be. And while no one looks forward to misunderstandings, it's wise to be prepared for them. We've found that having written agreements with our farmers (as well as retailers and other partners) can avoid a lot of headaches and confusion down the road.

Also, while some farmers may be a driving force behind your Buy Local effort, others will be downright skeptical. As with any new program, your Buy Local work will encounter some early adopters, others who have serious doubts, and a variety of people in between. Some folks may wait to see how things go before they commit to your campaign.

“You don't have to be all things to all people,” said CISA former Executive Director, Margaret Christie. “You can do a campaign that works well only for some people. Talk to all of your constituents, figure out who you are serving and who you are not, and be comfortable with that.” It's also important to keep in mind that your campaign may also affect those farmers who don't join with you.

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EVENTS AND ACTIVITIES FOR RECRUITING FARMERS

- Hold grower meetings to discuss the benefits and goals of your campaign.
- Send out limited recruitment mailings.
- Use newspaper ads as recruiting tools. Our farmers saw their neighbors in the newspaper and wanted to know why they weren't in the paper, too. Featuring participating farmers in newspaper and radio ads also gets them talking to other farmers about joining.
- Ask participating farmers to recruit their friends.
- Make sure you gather good data showing how farmers benefited in the first year so that you can use the results to engage more farmers next year.

Work to understand what your farmers care about and what would motivate them to participate.

CISA learned early on that some members of our farming community viewed formal media efforts as suspect or a waste of money. Similarly, some questioned our use of consultants who were not from our area. Again, an inclusive approach and clear communication about campaign decisions are critical.

Before you start recruiting farmers, ask yourself:

How can the campaign benefit potential participants? What benefits will participants receive? Which benefits are assured and which are not? Will the benefits be the same for everyone or will there be levels of benefits corresponding with levels of participation? What benefits might potential participants assume they will receive that you may not be able to provide? CISA developed a one-page Farmer Benefits Chart to explain how our campaign works and what farmers can gain by joining. A copy is included in the attachments at the end of this chapter.

What obligations will your participants have? Being upfront about participants' responsibilities is key. Will you ask farmers and retailers to agree to do a certain number of tastings, appearances or other events? Face-to-face work with the public may be an important part of your program; are your participants ready to put in the effort?

What obligations will you have to your participants? Will you put Buy Local stickers on the farmers' products or will they be responsible for that? Who decides which farmers are featured in campaign ads? Will you try to find markets for your farmers' goods, or respond to retailers' needs for local products?

What fees are involved in participating? Are you going to charge campaign participants? What will your annual membership fee be? Will it be the same for farmers and retailers or restaurants? Will one fee cover all aspects of your campaign or will there be different levels with different services (i.e., you may have farmers that only want to be in a farm guide, while others may want to participate more fully)?

What policy issues should you anticipate? Should point-of-purchase (POP) materials be used only for local products from farmers who are signed up as campaign participants or can retailers use them to promote all locally grown products? Whose input do you need to resolve these issues?

What understandings do you need to have in writing? What issues do your agreements need to address? What potential difficulties should you anticipate?

SUGGESTIONS FOR RECRUITING FARMERS

Make sure that your strategies for promoting local food sales are compatible with the goals and circumstances of your farmers. For instance, some farmers don't want to get into retail stores; they want to bring more people to their farmstands. If you are concentrating on retailers, then your campaign may not be the best fit for this farmer. Are there other ways this farmer could participate?

Work to understand what your farmers care about and what would motivate them to participate. Also explore what concerns or barriers might prevent them from joining.

Start with farmers you know. CISA was not able to convince all of the farmers we initially approached to join our campaign. "We started with farmers we had relationships with," said Margaret Christie. "This was a logical choice and made it easy at first. However, as we needed to widen the circle and engage other farmers, the recruitment process became more challenging."

Know when to back off. CISA spent a lot of energy recruiting an organic farmers' cooperative that we thought *should* be in our campaign, despite their assessment that we had little to offer them. Some staff continued to pursue them rather aggressively anyway. That annoyed the co-op and turned them off to our organization. Accepting their decision not to participate earlier would have preserved our relationship and we could have redirected our energy to relationships more likely to bear fruit.

Offer farmers benefits that are useful to their businesses, even if they don't join your Buy Local program. For instance, CISA produces an annual Farm Products Guide, which gives farmers the chance to become a member of CISA without joining the Local Hero campaign. Once we get to know each other, they can decide whether or not to join our campaign.

Make sure the requirements of joining your program aren't too much of a burden. CISA's main requirements for joining are filling out an application and becoming a member of CISA. (Our application process is discussed below.) If you have membership fees, make them reasonable.

THE APPLICATION PROCESS

CISA has taken a variety of approaches to our application process. Before we launched the campaign, we sent a mass mailing to all the farmers in our database. We sent a letter describing the campaign's goals and objectives, recent newspaper articles, and a survey. A CISA representative visited most of the interested farmers to discuss the campaign and gather the survey information that we required. This was great for building relationships and awareness of our campaign, but it also took a lot of time.

We've since updated our application process, which now includes the following steps:

1. An initial form establishes eligibility. We have basic environmental and product requirements—a prospective farmer must be producing an agricultural product as defined by the state (e.g., horses and horse operations are not considered agricultural products in Massachusetts) and must meet minimum soil and water conservation criteria.
2. A larger packet is sent to the farmer, which includes an in-depth survey, a letter of

agreement that must be signed and returned, a membership form, and an order form for the POP materials.

3. A signed agreement is received at our office.
4. We conduct a farm visit to:
 - Get to know the farmer
 - Figure out the farmer's expectations of the campaign
 - Deliver POP materials requested by the farmer
 - See the farm's operation and learn more about what is produced and how
 - Talk about the farmer's plans for the future, and how the farmer sees the campaign fitting into those plans
 - Show the farmer how important each farmer is to CISA

GROWER MEETINGS: GOOD FOR RECRUITMENT, GOOD FOR RELATIONS


One tool CISA has found essential for both recruiting farmers and maintaining good relations with them are periodic grower meetings. Farmer gatherings can be a great vehicle for talking about shared values, hopes for agriculture in your region, and your campaign. Farmers appreciate being involved in shaping the campaign and they can offer a lot of great ideas.

We've also found that our farmers greatly enjoy networking with each other. Some said that our meetings were one of the relatively few opportunities they had to spend time with fellow farmers. And some will meet other farmers with whom they can share equipment and ideas. The networking opportunities associated with the campaign are another reason why some farmers sign up. For the first two years, we brought our participating farmers together every few months.

Grower meetings can help you:

- Better understand what motivates and concerns your farmers
- Obtain their feedback on media ideas and events
- Get their thoughts on what aspects of your program are going well and which ones aren't

One tool CISA has found essential for both recruiting farmers and maintaining good relations with them are periodic grower meetings.



We've had farmers and retailers connect since our campaign's initial launch event; every subsequent meeting seems to have at least one or two such success stories.

- Ask how the campaign could be improved
- Solicit their involvement in outreach efforts
- Let them know about upcoming opportunities and events

As your pool of participants grows, considering bringing farmers, retailers and restaurants together for at least some of your meetings. Many of our farmers have tried for years to get into certain stores or restaurants, only to be stymied by taking the wrong approach or simply not knowing the best person to contact. We've had farmers and retailers connect since our campaign's initial launch event; every subsequent meeting seems to have at least one or two such success stories. Your campaign will benefit immensely from helping participants network.

MAINTAINING GOOD RELATIONSHIPS

Nothing beats personal attention to farmers' needs. Here are some ideas for maintaining great relationships:

- Invite farmers to a wide variety of activities.
- Design your events to have a "participating farmer component." For example, if your annual meeting features a popular speaker, combine it with a farmers market showcasing your farmers' products.

- Keep in touch with your farmers throughout the year by making phone calls and visits to see how things are going.
- Let them know about campaign developments and events by e-mail.
- Offer to help set up and staff tasting events at retail outlets that sell their products.
- Advocate for your farmers with prospective retailers. While we don't make any deals for farmers, we encourage retailers to contact us if there's a specific product they need and can't locate.
- Hold farmer meetings on a regular basis.
- Hold meetings that bring your farmers, retailers, restaurants and other participants together.

Cooperation vs. Competition: Anticipating and Managing Farmer Conflicts

There are many ways that farmers and others can work together to build support for local agriculture and sales of local farm products. Our farmers can and do work together to help each other out, whether it is during times of crisis like a barn fire or during routine business, like sharing equipment, ideas or insights. But how will your organization address the tensions that arise when cooperation is supplanted by



TIPS FOR GROWER MEETINGS

- Move the location around to make sure the distance people have to travel is shared as equally as possible.
- Provide food and drink (ideally featuring some of your farmers' products).
- Make meetings fun and interactive.
- Keep the meetings to two hours or less, with a clear agenda and good facilitation.
- Provide contact information so that participants can stay in touch with each other.
- Allow plenty of informal time for networking.
- Facilitate introductions and help people get to know each other.

competition? What if a farmer accuses others of acting unfairly, or worse, your program of favoring one farmer over another?

We've found that clear, open communication is the best approach, along with clear program requirements that are applied evenly at all times. For instance, make sure that:

- Your mailings are sent to all participants at the same time
- Your program benefits are available to all participants
- Campaign materials in short supply are clearly described as available on a "first come, first served" basis
- You create a waiting list, if necessary
- All campaign agreements and benefits are in writing and signed by the farmers and your organization
- You keep accurate notes on conversations that address complaints, benefits or concerns

While this may appear to be a lot of work on paper, it can help you avoid potential conflicts with and among your key constituents.

AND ONCE THEY JOIN YOUR PROGRAM...

Recruiting farmers for your Buy Local program can be very gratifying—each new farmer brings more products and energy to your campaign. But signing them up is just the beginning. At CISA, we've found that there are a host of other details that need tending:

- Make sure farmers have appropriate POP materials and know how to use them. In our campaign, farmers are responsible for labeling their products with our logo.
- Give your farmers a list of participating retailers and restaurants and keep them informed about who is looking for what products.
- Generate "fresh lists" for retailers and restaurants showing what products are currently available from your growers.
- Make sure your farmers can explain the campaign to others accurately, especially if they will serve as spokespeople.

- Help farmers communicate with retailers on issues like back door deliveries.
- Keep communicating the other opportunities afforded by your program.
- Update farmers on the campaign's overall progress toward increasing sales of local farm products and generating other benefits that are meaningful to your farmers



Farmer Benefits Chart

Community Involved in Sustaining Agriculture (CISA) January, 2002

Local Hero Campaign - \$100

Please note that membership in the Local Hero campaign requires a specific application. Contact the office for more information if you want to join the Local Hero campaign.

Membership

You become part of the community involved in sustaining agriculture -- farmers, retailers and consumers -- who by buying local farm products preserve open space, ensure environmental health and sustain the economic viability of Pioneer Valley farms.

Voting rights at CISA's Annual Meeting and the ability to serve on CISA's Board of Directors.

Proven Marketing Tools

High visibility in *Local Hero* newspaper advertising program.

Participation in CISA's newspaper ad 'Cost Share' program to stretch your ad dollars (available on a 1st come/1st served basis).

Opportunities to participate in radio advertising by taping the tag lines to CISA's radio ads.

Free professional photography services for *Local Hero* ads and permission to access *Local Hero* photos free of charge.

Your farm listed in the *Local Hero* section of CISA's website (www.buylocalfood.com) with a link to your farm web site, if applicable.

Unlimited supply of available *Local Hero* Point of Purchase materials — price cards, farm signs, logo stickers, etc.

Unlimited supply of available *Local Hero* promotional materials — bumper stickers and posters.

Free farm listing in the 2002 *Farm Products Guide* (200,000 copies printed and distributed throughout Franklin, Hampshire and Hampden Counties).

Extra copies of the *Guide* for your farm stand, as needed and as available.

Free listing on CISA's website in the *Farm Products Guide* section (www.buylocalfood.com) with a link to your farm's web site, if applicable.

Results of *Local Hero* year-end surveys to use in farm promotional materials.

Discount advertising rate in CISA newsletter (1500 circulation).

Exposure to Wider Markets

Links to media for promotions (for example, CISA referred a *Boston Globe* reporter to a local farm and the resulting story increased the farm's exposure -- and sales -- to a wider market).

Priority referrals by CISA staff to restaurants, retailers, individuals and organizations looking to buy locally grown.

Introductions to institutional food buyers.



Priority opportunities to be featured at and sell products at CISA events.

In-store tastings coordinated and attended by CISA staff.

Frequent listing in CISA's *Local Hero* handouts to the media, general public, funders and others interested in learning about the campaign.

Educational Opportunities

Individualized technical assistance with professional consultants (available on a 1st come/1st served basis).

Group workshops on topics relating to marketing, business development, farming practices and more.

Notification about conferences, workshops and other items of interest to the farming community.

A subscription to the *CISA Update*, 10% off all *Local Hero* merchandise and discounts to CISA events.



Chapter 6: Partnerships

Any Buy Local program needs to be grounded in its community and bolstered by a healthy array of partnerships. Broadening your base of support through mutually beneficial partnerships can be a powerful—and necessary—way to heighten the reach and impact of your Buy Local program.

In this section, we explore several key questions about partnerships:

- Why are partners valuable to a Buy Local program?
- What kinds of partnerships are important?
- What caveats should you consider?

WHY ARE PARTNERS VALUABLE TO A BUY LOCAL PROGRAM?

Community Involved in Sustaining Agriculture (CISA) has found partnerships to be essential to our work on a number of fronts. For instance, good partnerships can:

- Build ownership of the campaign among your community and key institutions
- Help you gain access to knowledge and capacity that you otherwise wouldn't have
- Build your credibility and provide political backing
- Provide more voices to advance your campaign's goals
- Generate financial and in-kind support
- Enhance the stability and sustainability of the campaign by ensuring that it isn't entirely reliant on one organization or a small group of volunteers
- Provide manpower and moral support

As a result, we encourage you to make a healthy investment in developing partnerships that can support your Buy Local program. CISA couldn't have carried our Buy Local campaign alone. Our partnerships have been central to the progress we've made.

WHAT KINDS OF PARTNERSHIPS ARE IMPORTANT?

We have found that being strategic in your



approach to partnerships is essential. It's also important to dedicate energy to the task, stick with it through the rough patches, and be deliberate in your approach. For instance, one way to go about it is to:

1. Look ahead and identify the resources—both tangible and intangible—your Buy Local program may need to be successful.
2. Identify other organizations that may share your values, would benefit from a successful campaign, and can offer some of the resources that are needed.
3. Craft a web of partnerships that can provide the needed resources.

CISA works with a variety of partners. They have brought the Local Hero campaign a useful mix of political backing, financial resources, technical assistance, and other forms of support. Among the most important of our partnerships are:

Massachusetts Department of Food and Agriculture (DFA). DFA has been an enthusiastic advocate and funder of our Buy Local campaign from the beginning. The commissioner of agriculture has been a vocal supporter and DFA staff often attend our board meetings and events. DFA even created a special pool of funding to start other Buy Local campaigns in Massachusetts, in large measure because they were impressed with the results of the Local Hero campaign.

Broadening your base of support through mutually beneficial partnerships can be a powerful—and necessary—way to heighten the reach and impact of your Buy Local program.



DISCUSSION QUESTIONS: DEVELOPING PARTNERSHIPS

As you begin to explore the partnerships that could best serve your Buy Local program, consider:

- What mix of resources does your Buy Local program need to be successful (e.g. financial support, political backing, technical expertise, volunteers, interpersonal connections, etc.)?
- What resources are needed that you and your current partners can't provide?
- Who can help provide what the campaign needs?
- Of those potential allies and partners, which share your values and could benefit from a successful campaign?
- What do you and each potential partner want from a relationship?
- What are the broader implications of each partnership (both positive and negative)?
- What roles can each of you best play? What rights and responsibilities will you have? What expectations do you have of each other?
- What strings might be attached for each of you?
- What aspects of your relationship need to be clarified in a written agreement?
- On what basis will you and your partners evaluate whether this involvement has met your expectations?

Hampshire College. Hampshire College offers us student assistants. One of the deans is on our board of directors. The college donates office space, phone lines and high-speed Internet access. Work-study students help us reduce staffing expenses.

W.K. Kellogg Foundation. While the Kellogg Foundation has been the primary funder of our campaign, we also think of them as a partner in our work. Their significant, multiyear funding allowed us to plan ahead without the immediate worry of cobbling together many small pieces of funding. They have also brought our work to the attention of the philanthropic community.

FoodRoutes Network. Kellogg also funded FoodRoutes Network (formerly Fires of Hope) to provide technical assistance and other support to CISA. FoodRoutes Network connected us with a number of communications experts, cajoled us into doing formal market research, coached us through our evaluation, and helped us raise funds. The communications expertise provided by FoodRoutes Network made a big difference in our ability to anticipate what a campaign would involve and helped build our staff capacity to design and run a campaign. FoodRoutes Network also worked with us to bring this toolkit to you.

Hampden County Farm Bureau. In this case, our partner approached us first. One year after we released our Farm Products Guide (which at that time covered only two counties), we were approached by the Hampden County Farm Bureau about publishing one for their part of our region. Unlike a lot of requests, this one came with a financial commitment and staff support. We worked together to create a new guide for their region and formally incorporated it into our larger guide the following year.

WHAT CAVEATS SHOULD YOU CONSIDER?

We've all experienced relationships that were fruitful and positive and others that were problematic. While CISA has been fortunate to have terrific partners, we'd like to offer a few caveats to consider when you explore a new partnership:

- Are there strings attached to this support, such as progress reports, financial reports, requirements to work on the partner's initiatives at your own expense, or travel requirements that may divert staff time from your projects?
- Are the "strings" explicitly stated or are they implied?
- Do you have the staff capacity to meet the partner's expectations and effectively implement your program?
- Organizations are often prompted by funders to show evidence of collaboration. Are you collaborating for collaboration's sake or are you working on a substantive project that is grounded in shared values?

Chapter 7:

Market Research and Message Development

So you've done the initial planning for your campaign. Your staff, board and farmers are mobilized. You've lined up a host of enthusiastic partners. And you have high hopes that your soon-to-be Buy Local program can make a big difference in your community. But you can't bring your campaign message to everybody. And your campaign is more likely to be effective and affordable if you have a clear, consistent message rather than several, more complex messages.

Who are the most important audiences for you to reach? What messages will they find most compelling? You now need well-researched, well thought-through answers to these questions. It's time to define your target audiences and identify campaign messages that will get their attention and spur them to buy local, local, local!

In this section of the toolkit, we explore the following questions:

- Why do market research?
- What are the basic steps in doing market research?
- How did Community Involved in Sustaining Agriculture (CISA) approach it and what did we learn?
- How did CISA translate our research into a campaign logo and slogan?
- What advice does our market researcher have for you?

Starting on page 33, you will find an interview with our market researcher and tips for selecting a market research firm. At the end of this chapter, we provide resources for conducting market research, the results of our pre-campaign market research, and our most recent post-season consumer awareness survey.

WHY DO MARKET RESEARCH?

Five months before CISA launched its Buy Local campaign, we commissioned a market research firm to help us figure out what audiences to focus on and what message to use. Doing this market research was a turning point in our campaign. Up to that point, our



communications plan was quite undefined. But honing our messages and target audiences really jump-started our work. Once we had those pieces in place, we moved ahead much more quickly and with much greater clarity. We were also positioned to develop the “look and feel” of the overall campaign, including a logo and a slogan. The look and feel we chose now permeates all of our Local Hero media, advertising, point-of-purchase (POP) and other materials.

Before we actually did the market research, however, we weren't convinced that such research was essential or that it would be worth the money. Message research wasn't part of our organization's culture or history. Some of our members thought this “high gloss” research was a waste of money. But our major funder and FoodRoutes Network (formerly Fires of Hope) were prodding us to do the research, provided funding for it and coached us through the process.

So we bit the bullet. We hired a polling firm, which interviewed 450 people in our three-county area. It cost about \$25,000. That seemed like a huge amount, but it helped CISA's campaign in a number of ways. The research gave our campaign direction and focus. It gave us credibility. It helped our board and staff let go of some misconceptions. It changed our thinking. It identified our target audiences and it helped

... your campaign is more likely to be effective and affordable if you have a clear, consistent message rather than several, more complex messages.

*Do the best research
you can. Get
professional help if
you can swing it and
listen to the results.
Your Buy Local effort
will be stronger and
more effective with
good market
research as a
foundation.*



us create a message that resulted in a campaign more successful than we could have hoped for.

CISA was fortunate to have had the funding and the coaching that we did. But even if you don't have the resources to hire a market research firm, there are many ways to obtain good market research. The supply of low-cost or free message research and market data is expanding all the time. Many universities have market research departments that might be good sources of assistance. You can also tap many public sources of demographic data to build your understanding of your market area. Several resources are listed in the attachments, including the FoodRoutes Network Web site, which includes audience research sponsored by that organization, which is available at no cost.

The key thing is to not assume that the public thinks as you do, that they share your perceptions, or that messages compelling to those of us who advocate for local agriculture will necessarily be compelling to anyone else. Do the best research you can. Get professional help if you can swing it and listen to the results. Your Buy Local effort will be stronger and more effective with good market research as a foundation.

The key steps involved in doing market research are:

1. Clarify the purpose of your market research. Ask yourself and your stakeholders:
 - What are the goals and intended scope of our Buy Local program?
 - Where are we in the communications planning process?
 - What else do we need to know?
 - What are our assumptions about how our campaign will unfold and the factors that will influence its effectiveness?
 - What do we believe our research is likely to show? (Stating your expectations upfront will position you/your researcher to design a survey that tests those assumptions.)
2. Review the market information that is currently available to you. Identify potential audiences. Learn about who they are, what they do and what they want.

Locate national, regional and local sources of message research. Learn about your local media market. Explore the communications channels you might use and the cost of using them.

3. Explore your options for conducting more formal market research. If you're considering hiring a market researcher, put out a request for proposal (RFP).
4. Develop a research budget. Identify partners who could benefit from your research and help pay for it. Raise any needed funds.
5. Identify the individuals or organizations that will help you conduct the research. If you work with a market research organization, discuss your goals and your research with them.
6. Choose your data collection methods, timing and tools. Consider the following questions:
 - What information do you most need to learn from the research?
 - What potential audiences do you want to better understand?
 - What messages do you want to test?
 - What geographic areas do you want to focus on?
 - How much time do you have to do the research?
 - What skills and financial resources can you bring to bear?
 - If you intend to use your data with outside audiences, what research methods would give you the greatest credibility with the media, partners, your local business community and other stakeholders?
 - What surveys, questionnaires, focus groups or other research methods are most appropriate given your goals and resources?
7. Conduct the research or hire someone to conduct it for you.
8. Analyze the research results and their implications for your Buy Local program. If you use a market research organization, have them give you a detailed, written record of the results and their analysis.

9. Use the results to clarify your audience, develop the look and feel of your campaign, choose a core message and develop a slogan that conveys it, create a logo and other materials, select messengers, and prioritize communications channels.
10. Develop a comprehensive communications strategy and game plan (see chapter 8 for more information).
11. Have the tools you need to evaluate your communications work in hand when your campaign begins. For example, if you provide a phone number for people to call, be ready to track the number of calls you receive and the questions that are asked. If you're placing radio ads or public service announcements, plan to call the radio stations the week the ads air to find out what their listenership was at that time.
12. After your campaign has been running for six to 12 months, conduct a "tracking" survey to assess the level of awareness that has been achieved, the campaign's influence on purchasing patterns, the effectiveness of your messengers and communications vehicles, etc. Revise your communications efforts appropriately.

HOW DID CISA APPROACH MARKET RESEARCH?

There are many ways to approach market research. Here, we tell the story of how CISA went about it. We hope this will help you explore your own options.

Developing Our Market Research Plan

We begin our story in January 1999. By that point, CISA had been thinking about a Buy Local campaign for quite a while. We'd already done some initial market research, and a committee of our partners and stakeholders had informally explored the demographics of our area and possible audiences and messages.

Then we started working with our market researcher, Marty McGough, formerly of Penn, Schoen & Berland Associates, Inc. (PSB) in Washington, D.C. PSB is a market research firm that conducts polls for politicians and many large corporations, but they also have a strong interest in nonprofits. Marty sat

down with us and we told him what we wanted to get out of the research.

First, we had been considering a wide variety of messages that we might use for our campaign. We wanted to find out which we should choose. The core messages that we wanted to test included:


- Locally grown food is safer.
- Locally grown food is fresher.
- Buying locally grown food helps the environment.
- Buying locally grown food helps your neighbor.
- Buying locally grown food helps the economy.
- Buying locally grown food supports a better future for your children.

Second, we had some other key questions we wanted the survey to help answer:

- What audience(s) should we focus on?
- What are the demographics, shopping habits, motivations and reasons for not purchasing locally grown food among our key audiences?
- Do we need multiple messages to reach our three-county area or should we go with one consistent message?
- Which newspapers, radio stations and other sources does our audience get information from on a regular basis?
- Which messengers would be most compelling to our audience?

Working from these questions, Marty identified the specific kinds of research data that we most needed. Then he translated those needs into survey questions. At PSB's recommendation, we opted to use a telephone survey approach (see Marty's interview on page 33 for more about this decision). Four hundred and fifty phone interviews were conducted with randomly chosen area residents by PSB's call center in Denver. The surveys were completed in February 1999, and by March we had the results and PSB's analysis of the data. All told, it took less than three months to initiate and design the survey, conduct the interviews and get the results.

Have the tools you need to evaluate your communications work in hand when your campaign begins. For example, if you provide a phone number for people to call, be ready to track the number of calls you receive and the questions that are asked.



We learned from our researcher that we shouldn't try to convince people that they ought to believe something they don't. Instead, focus on what they already believe and value.

THE RESULTS

Here are some of the key ideas that emerged from our pre-campaign market research:

- Most people found the messages, “Buying locally grown food **contributes to the economy**” and “When you buy locally grown food, you are supporting your neighbors” believable. On the other hand, they weren’t convinced that buying locally grown helps the environment.
- The belief that **locally grown food is fresher** was already well-established among those we polled. But many people also believed that buying locally grown food is **inconvenient**. This perception was the chief barrier that our messaging needed to overcome.
- The audience segment whose behavior we could most likely influence (i.e., the “**swing**” shoppers) are 35 to 49 years old, shop less frequently, and have slightly lower household incomes, less education, and more children than the general public in our area.
- The two **most effective messages** got a strong response in all three counties and from both swing shoppers and committed shoppers (those who were already spending 11 percent or more of their grocery bill on locally grown food). That meant that we didn’t need different messages for different counties or audiences—a huge relief.
- Farmers are viewed as the most **compelling messengers**, followed by health professionals.
- Several **key newspapers** are read by a large portion of our target audience.

The message research gave us a few big surprises. For instance, we had tested many messages (environment, personal health, local economy, help you neighbor, etc.) because we thought all of them might work. We were surprised by how well received the “Buying locally grown helps the local economy” and “Buying locally grown supports your neighbor” messages were and how ineffective the environmental message was. But once we had the results, it made sense: people in our area value the environment, but they don’t view buying local food as having an impact on the environment.

If we had followed our initial instincts and gone with an environmental message, we would have had to first convince people that buying local actually supports the environment and then motivate them to act on that new belief. We learned from our researcher that we shouldn’t try to convince people that they *ought* to believe something they don’t. Instead, focus on what they already believe and value. Your message should convey that you have what they *already* want.

The effectiveness of the local economy message was also consistent with the experience of Our Family Farms, a local cooperative of dairy farmers that CISA helped incubate. Although Our Family Farms sells hormone-free products, their primary message is about buying from your neighbor. We saw first-hand how well that kind of message works as their milk gained in market share in our area. The research clearly told us that we needed to develop a campaign slogan around the core message that buying locally grown helps the economy.

The survey also helped clarify the audiences we should focus on. The PSB study states:

A major objective of this study is to identify the segment among shoppers in western Massachusetts that demonstrates the most market potential. Borrowing terminology from political polling, we refer to this segment as the swing voter because it is the group most amenable to being swayed and can influence the outcome of an election. Other groups would include the committed voter, who represents your base of support. Borrowing liberally from this approach, the steps we have used to define the swing shopper are as follows:

1. Segment the shopper based on their level of agreement with the statement, “I would buy more locally grown foods if they were more convenient to obtain.”
 - a. Strongly Agree: 59%
 - b. Somewhat Agree: 28%
 - c. Somewhat/Strongly Disagree: 13%
2. Further segment the strongly agree (59%) into swing and committed shoppers based on the percentage of their monthly grocery bill accounted for by locally grown food.

- a. Swing (10% or less): 28%
- b. Committed (11% or more): 31%

Since [swing shoppers spend] less but [have] indicated [they] would spend more [if it was more convenient] this segment represents the best opportunity to influence and grow. We consider this the most important segment.

Based on their demographic analysis, PSB also concluded that:

The swing shopper is more likely to have a slightly lower household income, less education and more children (based on household size) compared to all shoppers and committed shoppers. They are more likely to be baby boomers (ages 35 to 49) and also shop less frequently (perhaps avoiding the number of times they have to take their kids to the store). Little difference was found between the swing shopper and all shoppers and committed shoppers in terms of gender, household location, or the [total] amount they spend on groceries each month.

With this information in hand, CISA had a much clear sense of who to focus on.

Developing a Slogan and Logo

Once we defined our audiences and messages, we met with a public relations (PR) professional who helped us develop a campaign slogan and logo. We talked about the survey results and, to our surprise, the consultant came up with Be a Local Hero, Buy Locally Grown right on the spot. (We feel pretty lucky that we arrived at a workable slogan so readily. It's rarely that easy.) Then we expanded on the Local Hero language so that our slogan would:

- Address the key perceived barrier that kept people from buying local (i.e., the belief that it's inconvenient)
- Give our audience the sense that they can have a positive impact on something they value (i.e., the local economy)
- Tell consumers exactly what action we wanted them to take (i.e., buy locally grown food)
- Reinforce what our audience already believed about local food (i.e., that it tastes better)



WHAT'S THE DIFFERENCE BETWEEN A MESSAGE AND A SLOGAN?

Messages are the core ideas that can compel your target audience to think, feel or act. Slogans are short, catchy and often memorable phrases that convey your messages, such as:

"Just do it" (Message: Exercise and fitness are important for good health.)

"Got milk?" (Message: Milk is healthy and nutritious.)

Slogans are particularly useful in advertising, on posters, and on POP materials, where you often have a limited amount of time or space to get your message across. One important thing to keep in mind: Messages can help develop your slogan, but you shouldn't let a witty slogan drive the development of your messages.

That thinking helped us complete our slogan:

*Be a Local Hero, Buy Locally Grown.
It tastes better, it's convenient and it helps
the local economy.*

Although it's a bit long, the slogan covers all of our bases. We've also found that the Local Hero concept gives us lots of latitude in our communications and outreach: farmers, consumers who buy local, kids, and the local products themselves can all be cast as local heroes. Everyone has an important role to play in our Buy Local campaign. While the Local Hero idea initially struck us as a bit off the wall, we have found that it works well.

As our campaign unfolded, we also found that the market research was important for other reasons. For instance, it allowed us to tell all the people who had slogan ideas why we couldn't adopt their personal favorite.

The research process also clarified that our goal wasn't fundamentally about educating people (for instance, by trying to teach them that there is a link between the environment and buying local). It was about delivering a call to action that would motivate people to purchase locally grown food. That action was the thing that mattered most to us, and that was where we set our sights. The research gave us the confidence and conviction that our message would actually resonate and spark action in our community.

When it came to developing the campaign logo, we sorted through a variety of

*... the Local Hero
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possibilities provided by our PR consultant. One option we considered incorporated an apple, but we felt that image had already been used in our area. We also considered a logo with an image of a barn. But we thought it lacked visual impact and seemed old-fashioned. It didn't seem like a good idea to use images that might imply agriculture was stuck in the 19th century.

Eventually, we arrived at this logo:



The process of deciding on a logo was a contentious and very rushed one for CISA. Various board and staff members had very strong feelings about the logo design. The PR consultant visited in March 1999, we finalized the logo in early June and we launched the campaign in June.

In the end, with our launch date approaching, our executive director decided to go with the logo shown above. One lesson we learned from the logo experience was that we should have clarified the decisionmaking roles of board and staff earlier in the campaign. We encourage you to think about this when planning your campaign.

Which Messengers Can Best Deliver Your Message?

Lastly, the message research also gave us more data on which messengers could best deliver our message. We tested the credibility of various messengers—everybody from farmers to elected officials and our local meteorologist. The results reaffirmed what we had expected: farmers were perceived as the most credible messengers. This data also reinforced the idea that it was important to personalize the campaign and help consumers feel connected to farmers. We've since made "the farmer's face" central to our newspaper ads, events, and other outreach.

POST-CAMPAIGN TRACKING SURVEY

Following the first summer of our campaign, in the fall of 1999, we conducted a "post-campaign tracking survey." This was a shorter and less costly survey to find out what level of awareness the campaign had achieved, which communications vehicles people remembered, and whether the campaign had led them to change their purchasing behavior. This survey, also conducted by Penn, Schoen & Berland, included 330 phone interviews and cost a little under \$10,000.

The tracking survey was important because it told us what impact we were having and which communications channels were most important to consumer awareness. Fifty-three percent of the people surveyed said they remembered our campaign. Of those people, 61 percent were influenced by the campaign to buy locally grown food. Our pollster told us that these figures were unusually high. And they certainly exceeded our expectations.



A WORD ABOUT INTELLECTUAL PROPERTY CONSIDERATIONS

When you've spent significant resources developing your logo and "brand identity," it may be prudent to consider some form of legal protection for your investment. You may also want to anticipate situations where your slogan or logo could be used by others for purposes that aren't consistent with your goals or otherwise aren't appropriate.

If you want to protect your work, then trademarking may be something to consider. You can start your research at the U.S. Patent and Trademark Office's Web site, www.uspto.gov. For more information, contact an attorney familiar with trademark law.

The tracking survey also helped us evaluate our communications work and focus our media dollars on what was shown to be most effective. For instance, campaign advertisements in local newspapers had the highest recall rate. Although newspaper advertisements were expensive, we continued with them and pursued new ways of getting our retail partners to include the campaign logo in their ads. We also continued using other media, like radio, because the data showed that repeating the same message through multiple channels increased the awareness that was achieved.

We've done tracking surveys every winter throughout our campaign. You'll find our most recent survey results, from January 2002, in the attachments at the end of this chapter.

Survey data (along with our own evaluations with farmers and retailers) also helped us enlist other farmers and partner organizations who had been skeptical earlier in the campaign. The data gave us the credibility that we needed to broaden our membership and support. The data also were a great tool in our fundraising efforts. The fact that we had credible evidence that the campaign was getting attention and influencing purchasing behavior made a world of difference with funders. Without it, we would have had to rely much more heavily on anecdotal evidence and our belief (and hopes) that the campaign was working.

On the pages that follow, you'll find a brief interview with our market researcher. From his vantage point with a major research firm, he shares his own colorful views about how to approach audience and message research.

A FEW WORDS FROM OUR MARKET RESEARCHER

Marty McGough, formerly of Penn, Schoen & Berland Associates, Inc. (PSB), designed CISA's audience research surveys. Founded in 1975, PSB is a strategic market research firm with offices in New York, Washington, D.C., and Denver. PSB has conducted strategic research for multinational Fortune 500 corporations and major political campaigns in more than 65 countries.

Marty had a big influence on CISA's thinking and the shape of our campaign. FoodRoutes Network, which supported CISA's initial

market research, interviewed Marty in late 2001 and we'd like to share his advice about doing this kind of research.

FoodRoutes Network: Why is audience and message research important?

Marty: The most important thing when you run any kind of a campaign is that you must identify the call to action that will motivate someone to take an action or be concerned. Unless you do this research, it's impossible to know the motivating factors that will spur an audience to action.

With CISA, we were looking for the messages that would spur purchases of local food—was it fewer pesticides, safer food, fresher food, environmental impact? In our surveys, the most compelling call to action was that buying local “supports the local economy and it supports your neighbor.”


If you don't do message and audience reach, you'll miss the call to action. I find that nonprofits often have preconceptions about what people care about. But you're probably wrong until you ask those people what they really think.

The other critical thing is to identify your audience. Who do you really want to influence? What audiences should you put your energy into? Segment the market. When you're doing the message research, you can also assess people's interest in an issue—what motivates them, what barriers to action they perceive. Then you can research the demographics and develop a profile of those target groups that are most important to focus on.

In choosing your target audience, you want to influence the swing voters—those who are either somewhat interested or not very interested in your issue. Those are the people whose behavior you have the best chance of influencing. Focus on people who say they are willing to and interested in buying local, but aren't yet committed to it. Give them compelling reasons to move forward. If you can, find a message (as CISA did) that is compelling to both the swing shopper and the committed shopper who already buys local.

In CISA's case, “benefits the local economy” isn't a campaign slogan, per se. But what we learned was the importance of stressing the primacy of the “local” idea in CISA's campaign. That was critical.

The most important thing when you run any kind of a campaign is that you must identify the call to action that will motivate someone to take an action or be concerned.



Find partners to
share the cost. Find
organizations and
businesses that can
benefit from the
outcomes that you
yourself want to
achieve.

FoodRoutes Network: What approaches can be used to conduct message and audience surveys?

Marty: The most common methods are focus groups and phone interviews. With a limited budget, do a telephone study. Don't do focus groups initially unless you have a lot of money. Developing messages, addressing obstacles to your goal, and identifying messengers, marketing and ad vehicles for carrying the messages can all be done through a phone survey. Make sure you hire a firm that can use a phone survey to give you all of that.

Focus groups are good at establishing a consumer language. The focus group format lets people talk about an issue in their own language. You want your campaign to use their language and focus groups help you identify that language and then mirror it in your own campaign.

Take CISA's Local Hero campaign. Research that was conducted by phone identified local messages as effective calls-to-action: benefits the local economy and supporting your neighbors. But CISA did not simply take the exact wording of the message that was tested for the campaign; instead, the "Be a Local Hero" slogan was adopted. Although CISA elected not to do focus groups, focus groups can be an ideal way to develop actual campaign materials and a slogan around the message you have identified in your telephone survey.

FoodRoutes Network: What does message development research cost?

Marty: I'd say that you need about \$25,000 to do basic message and audience research using a large research firm. It's a function of the math—the statistical significance that comes with different survey sizes. Our standard cost for each completed, 20-minute survey is about \$50. (*Editor's note: Other firms may offer lower rates depending on survey length and complexity of research.*) And 500 interviews give you a margin of error of plus or minus six percent. Why is that important? Because if you intend to use the data externally at all—with the media, government officials, etc.—results from surveys that are done with samples under 500 will be scrutinized more and the media may be reluctant to publish the results.

Since CISA had a more limited budget, we interviewed about 450 people for the pre-campaign message survey. It's always better to do more surveys than fewer. If you have \$15,000, I'd tell you to find more money so you can do 400 surveys rather than use the \$15,000 to do only 300.

FoodRoutes Network: How can organizations minimize the cost of their market and message research?

Marty: Find partners to share the cost. Find organizations and businesses that can benefit from the outcomes that you yourself want to achieve. With [Buy Local campaigns], if supermarkets thought that they might be more able to sell local food with shrewd marketing, go to them and get them to kick in money for consumer research. Say that you'll share the data with them and it will tell them how to sell this food in their stores. The key is to talk to as many groups as you can and form a coalition so you don't have to ask for so much money from any one group.

Keep in mind that you must define the objectives to suit their own needs and then make the case that that information will benefit others. Don't develop your questionnaire by committee. Don't do that. It will dilute the value and relevance to your own campaign. Have a reputable firm develop a survey that suits you, and get others to see how your tool can benefit them.

FoodRoutes Network: Many nonprofits don't have the resources to pay for professional research. What about getting a market research to give you a discounted rate or do the research on a pro bono basis?

Marty: There are many firms that do work cheaply to help the company's image—they might give you a lower rate to get the work on their resume. Do not do that! I can tell you that that kind of work is always relegated to the back burner when firms have that sort of motivation. You could enter a nightmare—you could get lucky or you might not. There is only one exception, and that is if the firm is committed to nonprofits and believes in your cause.

So be very selective when considering offers of pro bono work. Especially for large research firms, work for nonprofits is marginally profitable at best and they won't do a good job unless they are highly motivated for "values" reasons.

FoodRoutes Network: What about having a questionnaire professionally designed and then using volunteers to perform the phone interviews?

Marty: It's a bad idea to have volunteers make the phone calls using a professionally designed survey because it takes skills that volunteers don't have, you need consistency in the calling technique, and if you intend to use the research publicly, it will have no credibility to the outside world.

FoodRoutes Network: What common mistakes do you see nonprofit organizations make when planning and researching outreach campaigns?

Marty: They assume that the public thinks like them, and they don't. They think their issue is important to people, and it's not.

You must convince people to believe you. And you must find the thing that most convinces them. It's often something that has nothing to do with your campaign. For instance, the potential impact of the campaign on the economy of western Massachusetts overall is hard to predict. But ask people what they want to hear, and then tell them that.

For example, you can't go in with preconceived notions that people care as deeply about an issue as you do. There is an organization I know of, for instance, that wants to save from extinction a specific species of fish. The staff at that nonprofit have dedicated much of their professional lives to this goal. But people really don't care that much about saving a fish, especially when you consider all the other problems they have in their daily lives. Parochial interests dominate. So cast your issue in a larger framework that people already care about—such as the local economy or healthy food—and that will engage them.

The whole purpose of this research is to identify what people care about and generate a call to action that will work. Nonprofits are frequently blinded by their own motivations and passion for an issue and often think they know what call to action will work. In my experience, they are rarely right.

FoodRoutes Network: What other advice would you give you researching audiences and messages?

Marty:

- Know that people don't think like you do.
- You don't know what people think and what will motivate them to action. The whole purpose of this research is to understand that.
- People have underlying attitudes that will influence the effectiveness of the campaign. Until you do the research and then use it to twist and turn messages to respond to their underlying beliefs, you won't be successful.



WHAT SHOULD YOU LOOK FOR WHEN SELECTING A MARKET RESEARCHER?

Advice From Our Researcher

- The higher the recognition that the firm has, the better. If you'll use data only internally, finding a firm with the requisite skills is probably enough. But if you're going to release the results to the public, use the best-known firm because their name carries the most weight.
- Timeliness and responsiveness—will the firm spend the time it takes to do a good job for you?
- Examine the firm's track record. Have they done work similar to what you need?
- Is the firm willing to give you a price that is all-inclusive and very specific—and in writing?
- Does the primary contact person know your issue and care about it? Does that person understand your organization and what you are trying to accomplish?



RESOURCES

Market Research Data

FoodRoutes Network

This organization's Web site, www.foodroutes.org, includes the results from focus groups and extensive telephone polls conducted in locations across the United States in 2001 and 2002. These surveys explored attitudes, purchasing behavior and consumer messaging related to locally and sustainably grown foods.

Attracting Consumers With Locally Grown Products.

This October 2001 report was prepared by the University of Nebraska at Lincoln, Food Processing Center for the North Central Initiative for Small Farm Profitability. It can be downloaded at www.farmprofitability.org.

The Hartman Group

This Seattle organization has produced various research materials. For a complete list of their research reports, visit www.hartman-group.com/productslisting.html or call (425) 452-0818.

Perceptions of Rural America

This November 2001 survey, conducted by Greenberg Quinlan Rosner Research, measured the perceptions of urban and suburban residents in an effort to determine attitudes regarding rural life and the cultural values inherent in rural America. It also measured rural residents' perceptions of themselves and their communities. It is available on the W.K. Kellogg Foundation's Web site, www.wkkf.org.

Conducting Audience and Message Research

There are many resources for conducting audience and message research; the ones listed here are a few of the best and easiest to read. Some of the best literature is about focus groups. Many of the principles for planning and conducting good focus groups apply to other research methods, so do consult them even if you expect to other use methodologies.

The Focus Group Kit

This 1998 series of six books, is available as a set or separately from Sage Publications in Thousand Oaks, Calif. (phone: (805) 499-9774; Web: www.sagepub.com, or e-mail: order@sagepub.com). Sage publishes many of the most-respected texts on focus groups. These books contain a wealth of information about focus groups, and are very easy to read and understand. The titles are nicely self-explanatory and include:

The Focus Group Guidebook, Focus Group Kit, Volume 1, David L. Morgan

Planning Focus Groups, Focus Group Kit, Volume 2, David L. Morgan

Developing Questions for Focus Groups, Focus Group Kit, Volume 3, Richard A. Krueger

Moderating Focus Groups, Focus Group Kit, Volume 4, Richard A. Krueger

Involving Community Members in Focus Groups, Focus Group Kit, Volume 5, Richard A. Krueger and Jean A. King

Analyzing and Reporting Focus Group Results, Focus Group Kit, Volume 6, Richard A. Krueger



Conducting Audience and Message Research (continued)

Focus Groups: A Practical Guide for Applied Research, Richard A. Krueger, 1994.
This is regarded as the “bible” of focus group research. Good additions to the 1988 edition are broader coverage of analyzing results and of cultural diversity.

The Wilder Nonprofit Field Guide to Conducting Successful Focus Groups, Judith Sharken Simon, Wilder Publishing Center.

Making Health Communications Work, National Cancer Institute, U.S. Department of Health and Human Services.

This is a classic for health communicators and covers excellent audience research basics in good “how-to” detail. The hard copy is no longer available, but you can access the information online at http://rex.nci.nih.gov/INTRFCE_GIFS/INFO_PATS_INTR_DOC.htm

Successful Focus Groups: Advancing the State of the Art, David L. Morgan, ed., Sage Publications, 1993.

Attachments

Penn, Schoen & Berland Final Research Report (March 1999)

Penn, Schoen & Berland Post-Campaign Tracking Survey Results (January 2002)





Fires of Hope Marketing Campaign Western Massachusetts

**FINAL RESEARCH REPORT
MARCH 1999**

Penn, Schoen, & Berland Associates, Inc.
Washington, DC • New York • Denver

EXECUTIVE SUMMARY

Background & Objectives

This summary highlights the major findings of a telephone study conducted by Penn, Schoen & Berland Associates, Inc. (PSB) among 450 respondents who reside in the city of Springfield and in the Western Massachusetts counties of Berkshire, Franklin, and Hampshire.

The main objective was to identify messages that can be incorporated into a consumer advertising campaign designed to increase awareness of and demand for locally grown fruits, vegetables, dairy products, and poultry. Successful consumer-based advertising can help CISA's (Community Involved in Sustaining Agriculture) Fires of Hope campaign achieve its stated goals of increasing farmers' incomes and their use of environmentally-sustainable agricultural practices.

Major Findings

The major conclusion of the study is that a single campaign can be used to advertise the benefits of locally grown food to all residents of Western Massachusetts. Results of the study indicate that although differences exist between and among people based on geography, gender, age, income, education, and food shopping habits, these differences are not sufficiently large to necessitate or justify the need for a differentiated advertising campaign directed at distinct market segments.

Major findings of the study that must be incorporated into the consumer advertising campaign include:

- Advertising messages that highlight the personal contribution a person makes to the **local** economy and to his or her neighbors when buying locally grown foods will be more successful than messages that communicate concerns about the environment, safety, the future, and personal health and individual well-being.
- It is important to incorporate into advertising the widely held beliefs that locally grown food is **fresher**. This will support the "local message" well.
- The major obstacle to the sale of locally grown food is the perception that it is **inconvenient** to buy. A lack of information about where locally grown food can be purchased and how to distinguish it from other foods reflect and reinforce this perception of inconvenience.
 - The central "local" message, fresher message, and overcoming inconvenience can be integrated. For example: Support your local economy and neighbors by buying locally grown food that's fresher and tastes great. Available at many locations throughout your area. For more information . . .
- A successful local farmer will be much more successful in communicating the benefits of buying locally grown food than other messengers.
- Newspapers will serve as an effective advertising and communicating vehicle and efforts should be made to get producers to offer coupons for locally grown food. Radio advertising can also be successful but listening patterns suggest that advertising must be broadcast on several different stations.
- Direct marketing avenues can be successfully employed as a means of raising awareness of the benefits of buying locally grown food and the locations at which it can be purchased.

METHODOLOGY

Penn, Schoen, & Berland Associates, Inc. (PSB) conducted 450 telephone interviews, of approximately 20 minutes in length, with residents of Western Massachusetts who were identified as the primary buyer of food in the household. The sample distribution is as follows:

• City of Springfield	202
• Hampshire County	82
• Franklin County	84
• Berkshire County	82

All completed surveys from the three counties were aggregated as an approximation of a less urban, or a "non-city" geographic area.

STRUCTURE OF THE REPORT

This report is designed to highlight findings that bear directly on the development of messages for a consumer advertising campaign for locally grown foods. Detailed data tables that depict results from all survey questions by demographics and shopping patterns are provided as an appendix to this report.

Although we have concluded that a single campaign with a unified message can be successful, a major objective of this study is to identify a discrete market segment that demonstrates the most market potential. Penn, Schoen, & Berland, Associates Inc. (PSB) refer to this segment as the "Swing" Group because it is most amenable to being swayed or influenced by advertising messages. The last section of this report discusses this Swing Group in detail.

The first section provides a summary of respondent demographics and their broad food shopping patterns. The second section discusses major findings that influenced the development of messages for the campaign. The third section discusses messengers and advertising vehicles for the campaign.

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A. DEMOGRAPHICS & SHOPPING PATTERNS

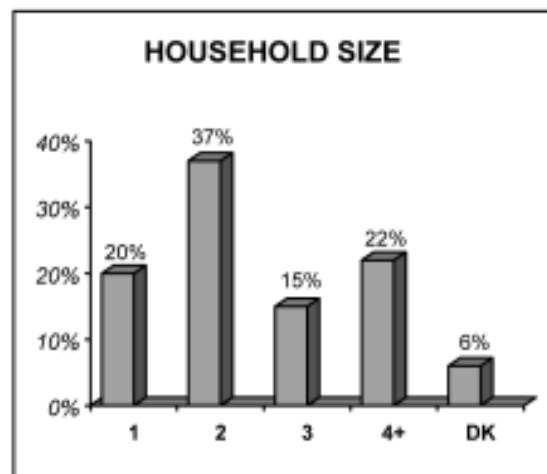
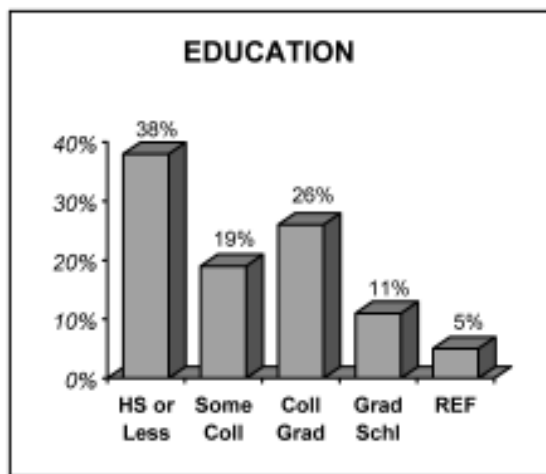
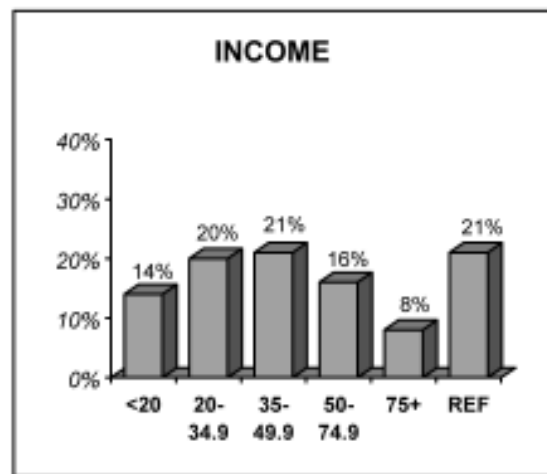
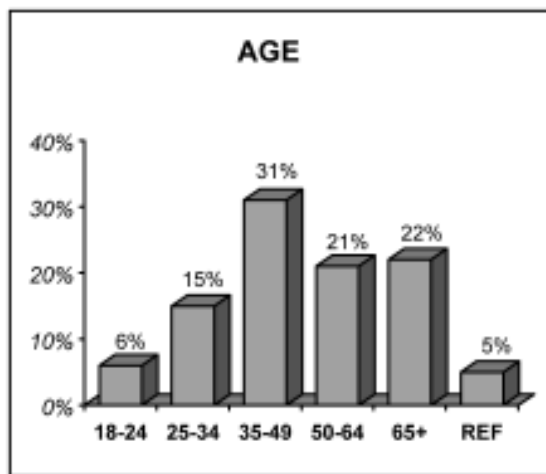
DEMOGRAPHICS

As detailed below, a broad cross-section of people were interviewed for the study. Notable, but not displayed in a chart, is that men accounted for one-third (33%) of primary grocery shoppers. The incidence of male shoppers was lower in the City of Springfield (29%) compared to the combined 3-country region (37%).

Some general findings based on demographics include:

- Younger consumers ages 18-34 shop less frequently
- Females are more likely to shop more than once a week
- Baby-Boomers ages 35-49 and college graduates spend a higher percentage on their grocery bill on locally grown food

The last section of this report discusses demographic differences between the segment identified as having the highest market potential (Swing Group) and other segments.



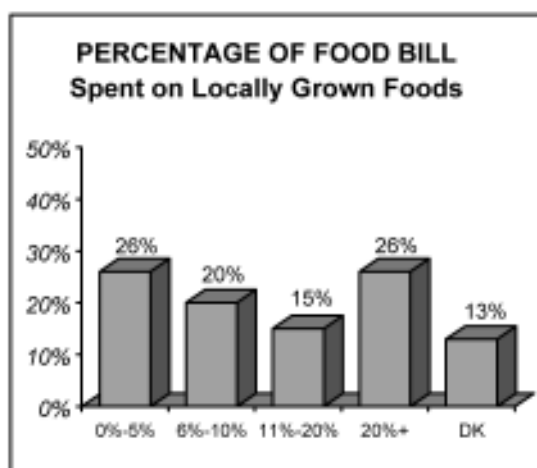
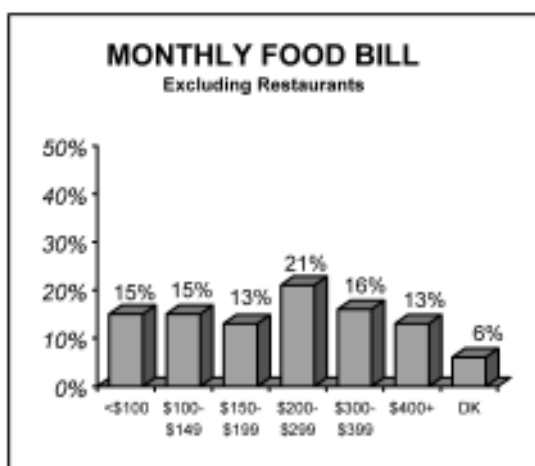
SHOPPING PATTERNS

Although the distribution of how much respondents spend each month on groceries is wide, nearly eight of ten (78%) shop at least once a week and a third (34%) shop more than once a week. Frequent shopping should provide an opportunity for producers to communicate the “freshness” of their locally grown product.

About one-fourth (27%) of shoppers identify locally grown food by location or where they purchase it, such as a farmers’ market or road side stand. An additional 14% mentioned that they had personal knowledge of the producer or the brand name of the product.

Less than half (46%) of shopper identify locally grown food by more traditional means, such as labels on the product (27%) and signs that state the product is locally grown (19%). An important finding of the study was that more shoppers would buy locally grown food if it were labeled as “local.”

A little less than half (46%) of shoppers spend at least 11% of the grocery bill on locally grown food and one-fourth (26%) spend over 20%. We will look closely at this segment when we identify the “Swing” Group in the last section of the report.



B. MESSAGE TESTING

Respondents were read a series of statements about locally grown foods and asked whether they were *believable* (very, somewhat, not very, not at all) and whether each would make them much *more likely* to buy locally grown foods, somewhat more likely, or have no effect. The messages tested for the study are outlined in the table below.

Message	Believability		More Likely to Buy	
	Very	Total	Much More	Total
Buying locally grown food greatly contributes to the local economy.	64%	92%	44%	78%
When you buy locally grown food you are supporting your neighbors.	58%	86%	40%	75%
When you buy locally grown food you are helping to preserve the rural character of your region.	47%	80%	36%	72%
Locally grown food usually tastes better.	40%	78%	39%	75%
Buying locally grown foods is a way for people to make a statement about making the future better for today's children.	26%	62%	25%	55%
When you buy locally grown foods you are helping to save the environment because local farmers use environmentally safe agricultural practices, like less pesticides.	25%	60%	28%	59%
Buying locally grown foods is a way to improve your personal wealth and individual well-being.	18%	52%	20%	50%
Locally grown foods are always safer because local farmers are less likely to use unsafe methods such as pesticides.	18%	49%	26%	55%

Total Believability: Percentage Very Believable + Somewhat Believable

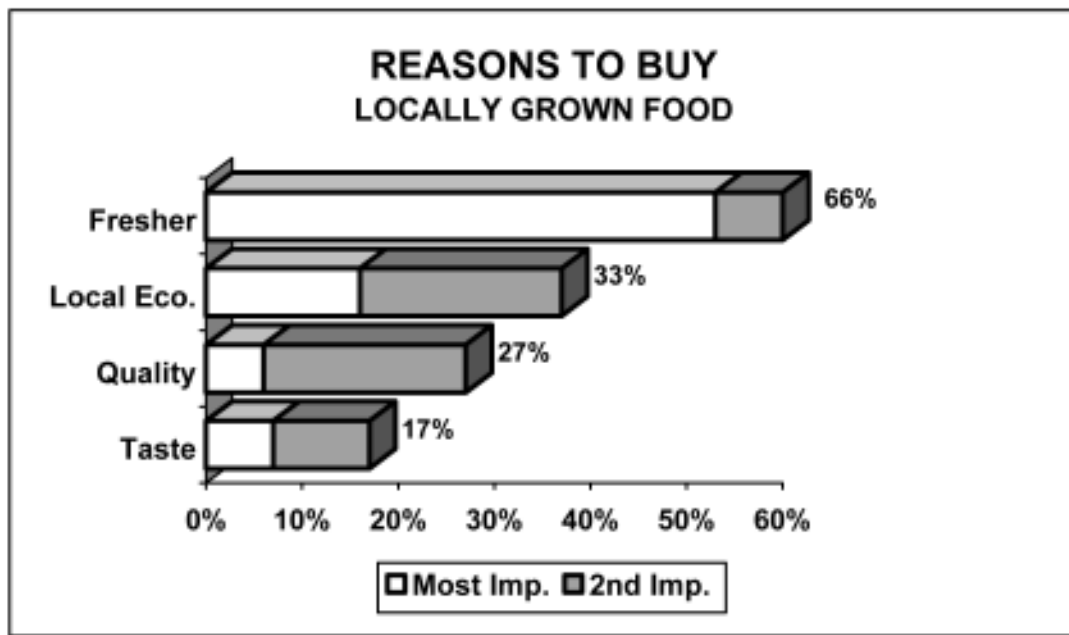
Total More Likely to Buy: Percentage Much More Likely + Somewhat More Likely

The results outlined on the table demonstrate that messages which stress the **local benefits of buying locally grown food** were most effective.

- Nearly all (92%) of respondents agreed (64% strongly) that *buying locally grown food greatly contributes to the local economy* and 78% said that this makes them more likely (44% much more likely) to buy locally grown foods.
- 86% of respondents agreed with the statement (58% strongly) that *when you buy locally grown foods you are supporting your neighbors* and 75% said that this makes them more likely (40% much more likely) to buy locally grown foods.
- Eight of ten respondents agreed with the statement (47% strongly) that *when you buy locally grown foods you are helping to preserve the rural character of your region* and 72% said that this makes them more likely (36% much more likely) to buy locally grown foods. The local connection is evident here.

Messages about buying locally grown foods related to making the future better for their children, helping the environment, improving one's personal health and individual well being, and safety (no use of pesticides) were much less effective.

Contribution to the local economy was also an important reason to buy locally grown food.



Product Attributes: Freshness & Taste

The most important reason cited to buy locally grown food was freshness. In fact, a majority (53%) mentioned it as the *most important* reason. Although freshness was not tested as a message, taste was, and taste was the fourth most effective message:

- Seventy-eight of respondents agreed (40% strongly) that *locally grown food usually taste better* and 75% said that this makes them more likely (39% much more likely) to buy locally grown foods.

Given these results, it is critical to assess the role product attributes (freshness, taste, and quality) should play in message development for the advertising campaign.

Product Attributes

There is no disputing that freshness, taste, and quality are important when thinking about buying locally grown foods.

- Over 90% of shoppers say that freshness is *very important* to them when buying locally grown fruits, vegetable, and dairy products (88% for poultry products).
- Eight of ten agree (48% strongly) that locally grown foods are always fresher.
- Nearly three-fourths (73%) of respondents agree (38% strongly) that locally grown foods offer higher quality.

However, from a messaging perspective, it is critical that the “local” message not be diluted or placed second to the message that locally grown food has more desirable product attributes. The reason is that *locally grown food is fresher* or *locally grown food tastes better* is a top-of-mind, well-established belief. Shoppers already associate freshness and, to a somewhat lesser degree taste and quality, with locally grown food.

The belief that locally grown food is fresher and tastes better is pervasive enough that it does not constitute a *call to action* to buy more locally grown food. Consumers are more likely to respond positively to an advertising campaign that provides them with a NEW piece of information and empowers them to act in such a way that they believe their actions are purposeful. The best situation is one in which a message tells them something NEW they already believe, reinforces other more top-of-mind beliefs and, at the same time, provides them with a sense that their actions have impact.

This is why each of the top 3 messages had a “local” theme and why they scored higher on believability and more likely to buy than taste. Consider *greatly contributes to the local economy*.

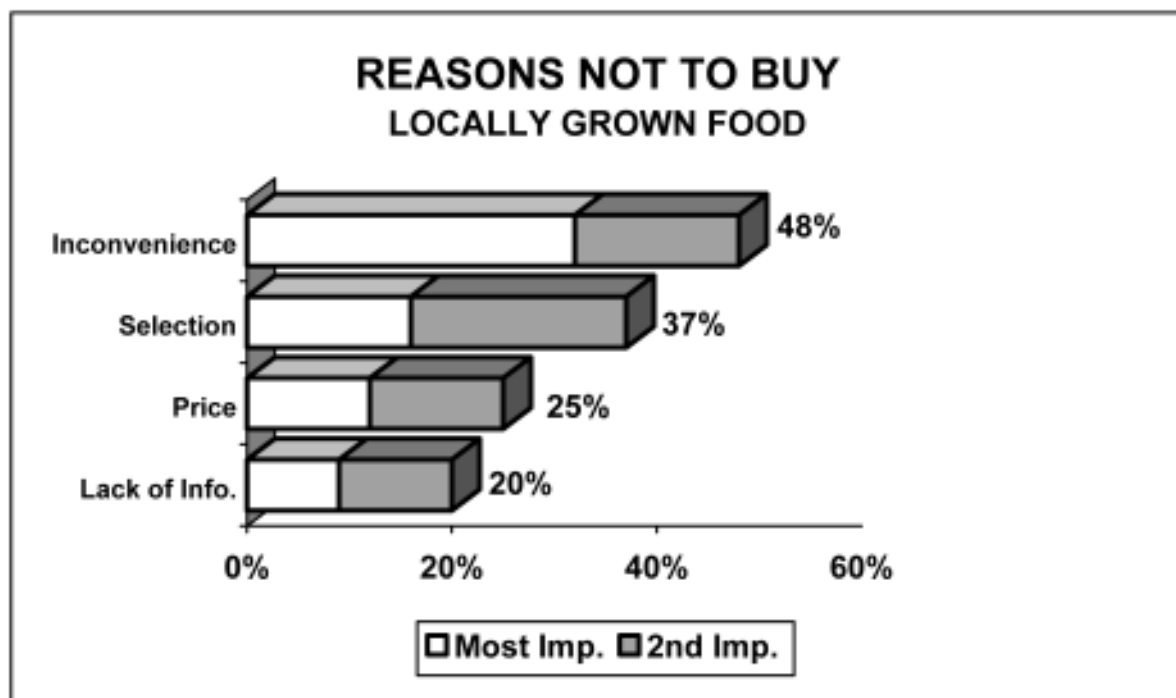
1. It activates a belief that is not top-of-mind (most people do not generally think about helping the local economy as the major reason to buy locally grown food). It is therefore new information and tells them something they “do not know.”
2. It is highly believable (64% very believable) and therefore resonates well with their belief systems.
3. It is an effective call to action (44% said it makes them much more likely to buy locally grown food). It gives people a sense that their actions bring measurable benefits to something (local economy) that they have a stake in and which is close-by (their community).
4. It grabs their attention and makes them think about buying locally grown food in terms of the benefits it could bring. It also activates other belief systems – e.g. “I never really thought about locally grown food in that way; I usually think about freshness and taste” – and therefore has the effect of combining or coupling more than one benefit to the purchase of locally grown foods.
5. It is a better call to action to overcome obstacles to the purchase of locally grown food (inconvenience discussed in next section).

A message stressing the local benefits of buying locally grown food cannot ignore product attributes such as freshness and taste. It is important to not only provide new information but to REMIND them about what they already know. Thus, advertising that stresses the local connection must also mention freshness and taste. For example, *support your local economy and neighbors and buy locally grown food that’s fresher and tastes great*.

Importance of Making Purchase of Locally Grown Foods Convenient

The perception that it is inconvenient to buy locally grown food is an important obstacle, especially considering that 86% of respondents said that the convenience of the shopping location was important (60% very important) when considering where to buy food.

Respondents were provided with a list of reasons for not buying locally grown food and asked to identify the most important and second most important reason. As the chart below demonstrates, **inconvenience** (32% most/16% second most important) was perceived to be the biggest obstacle, followed by **lack of selection**¹ (16% most/21% second most important). Lack of selection is closely identified with inconvenience and so is **lack of information**.



It is important to place **price** as a reason not to buy locally grown foods into perspective. In consumer research, price is frequently mentioned as a major obstacle to purchase. Considering that three of the top four reasons for not buying locally grown food are related around the notion of inconvenience, price is comparatively much less important. Additionally, we “tested” the importance of price for locally grown food: 73% of respondents agreed (38% strongly) that “when locally grown foods cost a little more they are worth the extra cost.”

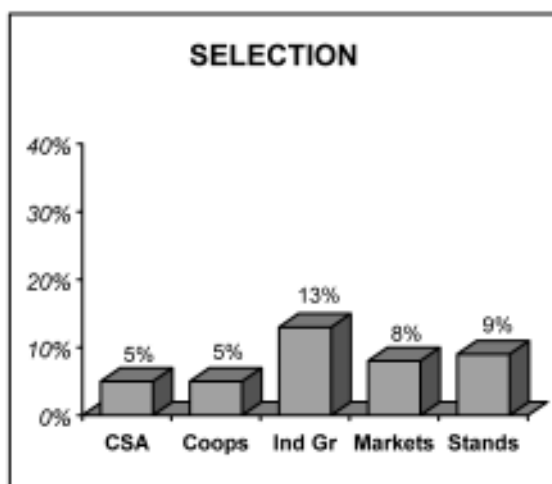
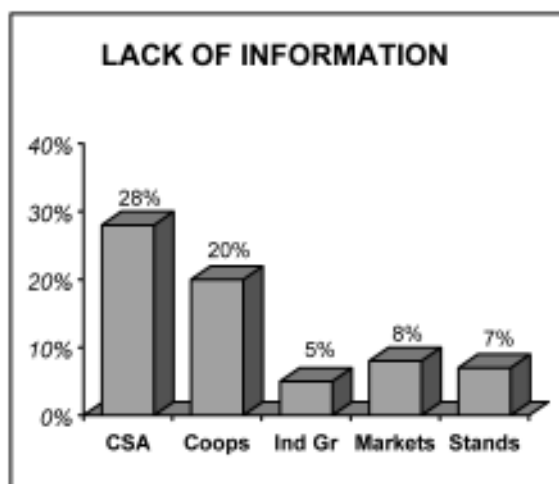
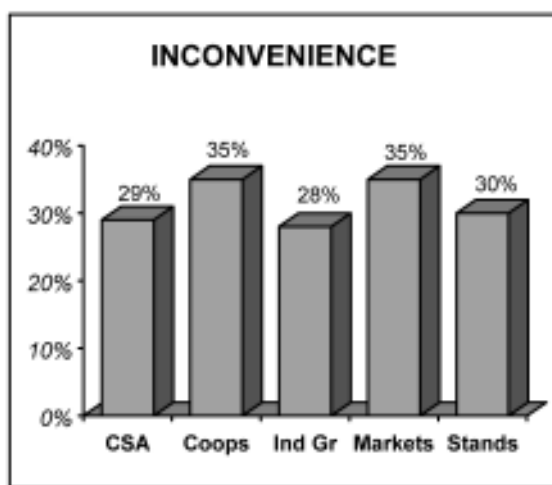
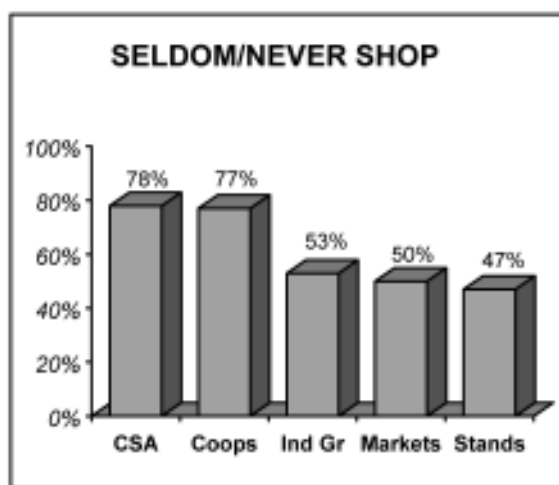
On a closely related point, inconvenience is perceived to be the major reason why people do not shop at some of the outlets commonly associated with selling locally grown food. This conclusion is discussed in more depth on the following page.

¹ Lack of selection also includes the response “can’t buy all of my grocery items at one location.”

Respondents were asked how often they shopped (frequently, sometimes, seldom, or never) at distribution outlets that are commonly associated with locally grown foods:

- Community Supported Agricultural Farms (CSA in chart below)
- Food Cooperative (Coops)
- Small Independent Groceries (Ind Gr)
- Farmers' Markets (Markets)
- Road Side Stands (Stands)

As the charts below illustrate, the percentage of respondents who either seldom or never shopped at them is quite high and the major three reasons cited for this were inconvenience, lack of information, and lack of selection.² These results substantiate the finding that inconvenience is a major obstacle to the sale of locally grown foods. (Note: two-thirds of shoppers seldom/never shopped at convenience stores. The most important obstacle was price).



² The responses of people who said they *sometimes* shop at the outlets were included in the last three charts which identify the major obstacles (inconvenience, lack of information, and lack of selection).

Messaging Around Inconvenience

We have seen that advertising messaging must stress the local benefits of buying locally grown food while also communicating freshness and taste. The discussion of inconvenience as a major obstacle to purchase indicates that the advertising campaign must also deal directly with this issue.

The following examples of messages can clarify this point. They are not intended as actually slogans or copy to be used in advertising but rather as a means of illustration.

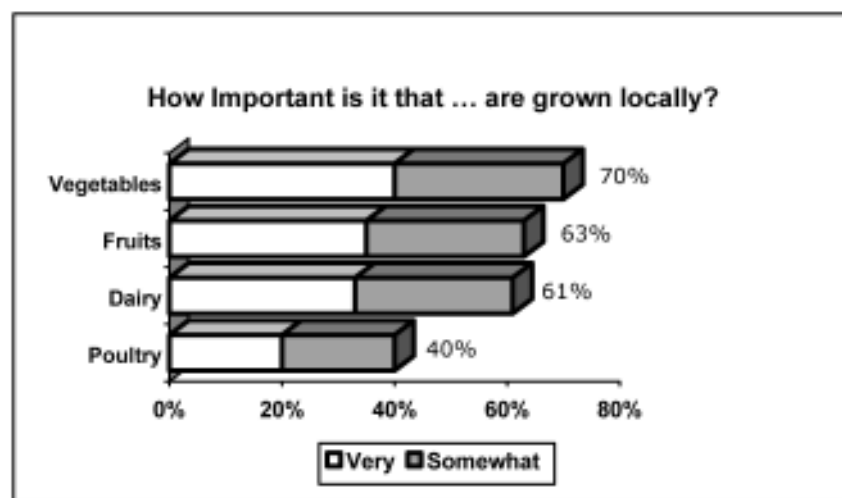
- A. Support your local economy and neighbors by buying locally grown food that's fresher and tastes great. Available at many locations throughout your area. For more information, call 1-800-XXX-XXXX.
- B. Make a difference in your community by buying locally grown foods. They're fresher, taste great, and are available at XX locations in your area. Call 1-800-XXX-XXXX for more information.
- C. Fresher, better tasting food is closer than you think. Support your local economy and neighbors by buying locally grown food. Call 1-800-XXX-XXXX for a detailed map of the locations in your area.

What these messages have in common is:

- 1. The local connection (economy, neighbors, community) is front and center.
- 2. Freshness and taste are provided as "reminders."
- 3. Perceived inconvenience is dealt with directly. It may not be possible to say that "there are 50 locations" at which you can buy locally grown food but it is important to communicate the idea that they are widely available. A map would be ideal, if possible.
- 4. There is a direct call to action. Even if a 1-800 number is not used, it is important to let consumers know how they can follow up for more information.

Why the Campaign Could Be Successful

Messaging that contains a call to action (local connection), a reminder (fresher and taste better), and a remedy for obstacles (inconvenience) can be successful because people generally think that buying locally grown food is important.



C. Messengers & Advertising Vehicles

Messengers

Respondents were read a list of names or types of jobs and asked to tell us if they found them convincing in talking about the benefits of buying locally grown food.

Messengers	Convincing		Not Convincing	
	Very	Total	Not At All	Total
Successful local farmer	53%	86%	9%	13%
Health professional or doctor	42%	78%	14%	19%
Business owner from the area	18%	56%	24%	40%
John Olver, U.S. Congressman	14%	36%	39%	54%
Jane Swift, Lt. Governor	12%	35%	37%	54%
Tom Bevacqua, Channel 40 meteorologist	12%	31%	42%	58%
Locally elected government official	10%	36%	42%	60%
Martin Carrerra, Owner, La Veracruzana Restaurant	9%	25%	37%	53%
College President	8%	25%	46%	70%
Stan Rosenberg, State Senator	7%	28%	41%	57%
National sports hero	7%	20%	54%	75%
Musician	7%	18%	53%	75%
Teenage Mutant Ninja Turtles	6%	10%	70%	81%

Total Convincing: Percentage Very Convincing + Somewhat Convincing

Total Not Convincing: Percentage Not Very Convincing + Not At All Convincing

Survey results clearly indicate that a successful local farmer is the best messenger among those tested. Nearly nine of ten respondents (86%) found a farmer convincing and a majority (53%) thought a farmer would be very convincing. Other than a health professional or doctor, no other possible messenger was considered very convincing by greater than 18% of respondents.

- A health professional or doctor was found convincing by 78% of respondents (42% very convincing). This finding is commensurate with research conducted in other areas as health professionals generally enjoy high credibility. However, because of the importance of the "local" message to the campaign, it is advised that a local farmer would be more appropriate. A health professional could play a supportive role in communicating the safety of locally grown food, although we have seen this to be a less effective message.

Utilizing a local farmer as a spokesperson does not mean that it has to be one, recognizable person (e.g. "Farmer Joe"). It is likely that the reason a farmer tested so well was because of the strong sentiment for messages that stress the local economy, neighbors, and supporting the rural character of the region. For this reason, and because no comparable spokesperson was tested, it is appropriate to consider a campaign spokesperson other than a farmer that can adequately represent the messages that tested well.

- If this is considered, it is important that the spokesperson not be an elected official or person of high notoriety because the messages that worked well have a "down-to-earth" flavor.

Similarly, one can extrapolate from a farmer to the use of the farming image in advertising where a spokesperson is not involved.

- The use of farming-related images on print ads or promotional pieces used for direct marketing can be effective. A muted background image of a farm-house next to crops is an example.

Advertising Vehicles

Newspapers could offer an effective vehicle for advertising the campaign because readership in Springfield and in the 3 counties of Berkshire, Franklin, and Hampshire is high. A majority of respondents from Springfield and Berkshire and Hampshire counties regularly read the major newspaper:

- Springfield: 56% regularly read the *Union-News/Sunday Republican*
- Berkshire county: 59% regularly read the *Berkshire Eagle*
- Hampshire county: 60% regularly read the *Daily Hampshire Gazette*
- Franklin: readership is lower; 29% regularly read the *Recorder*

The finding that nearly half (49%) of respondents would be more likely to buy locally grown foods if they could use coupons indicates that their inclusion in newspapers could increase usage of locally grown foods. Since newspaper advertising can be expensive, it is wise to consider contacting major supermarkets as potential partners since the results indicate that considerable scope exists for them to profit from the sale of locally grown food.

- Please refer the "Concluding Thoughts" section for a more detailed discussion about the applicability of survey results to supermarkets.

Radio advertising can also be successful but listening patterns suggest that advertising must be broadcast on several different stations.

Radio Station	Springfield	3 Counties
Easy listening	16%	14%
Soft rock	14%	10%
All talk	13%	8%
Country	12%	13%
NPR	12%	20%
All news	6%	9%
Hard rock	5%	6%

Other Vehicles

The strength of local messages suggests that local and more “grass-roots” advertising could be successful.

- Approximately one-third (33%) of shoppers regularly read “small town” and other community type newspapers. Advertising in smaller, less frequently published newspapers is an inexpensive way to reach a fairly large audience.
- A recent article published in the *New York Times* suggested that Americans have become over-exposed and desensitized to television and cable advertising and mentioned that billboard advertising is experiencing somewhat of a renaissance. This is an option that could be considered.
- Local cable television and public access is an inexpensive and, in some cases free, advertising medium.
- Depending on available resources, grass-roots efforts to disseminate and post flyers and other similar material to area business establishment, government offices, and even resident’s homes (door-hangers) should be seriously considered. A public campaign fits in well with the local messages.
- Over three-fourths (77%) of respondents agreed (49% strongly) that they would buy more locally grown food if they were clearly labeled as local. This suggests that people have trouble identifying it and this presents a vast opportunity to work collaboratively with producers and distribution outlets to employ point-of-purchase displays.
- Nearly half (46%) of Shoppers have Internet access at home or work. This also presents a possible opportunity for advertising on the “Web.”

D. SWING ANALYSIS

Defining the Swing Shopper

A major objective of this study is to identify the segment among shoppers in Western Massachusetts that demonstrates the most market potential. Borrowing terminology from political polling, we refer to this segment as the "Swing" Voter because it is the group most amenable to being swayed and can influence the outcome of an election. Other groups would include the *Committed* (voters who represent your base of support) and the *Opponent's Base* (people that will never vote for your candidate).

Borrowing liberally from this approach, the steps we have used to define the "Swing Shopper" are as follows:

1. Segment the shopper based on their level of agreement with the statement "I would buy more locally grown foods if they were more convenient to obtain."³
 - a. Strongly Agree 59%
 - b. Somewhat Agree 28%
 - c. Somewhat/Strongly Disagree 13%
2. Further segment the Strongly Agree⁴ (59%) into Swing and Committed Shoppers based on the percentage of their monthly grocery bill accounted for by locally grown food.⁵
 - a. Swing (11% or less) 28% *Re-proportioned excluding don't knows
 - b. Committed (11% or more) 31% *Re-proportioned excluding don't knows



³ We use this approach because of the importance of inconvenience as an obstacle to purchasing locally grown food. It also allows us to see how well the messages test among Swing and Committed Shoppers.

⁴ We could have looked at the somewhat agree as a swing, but we wanted to use a more conservative approach.

⁵ In the survey we provided respondents with 4 discrete choices: 5% or less, 6%-10%, 11%-20%, and over 20%. Based on the distribution of responses, we labeled those who spent less than 11% of their grocery bill on locally grown products as "light" locally produced buyers and those who spent 11%+ as "heavy."

Thus, two important segments are:

1. COMMITTED Shoppers that spend 11% or more of their grocery bill on locally grown food. Since this group already spends the highest percentage on locally grown food, advertising can increase their level of purchase.
2. SWING Shoppers that spend 10% or less of their grocery bill on locally grown food. Since this group spends less but has indicated it would spend more (if it was more convenient) this segment represents the best opportunity to influence and GROW.
 - **We consider this the most important segment.** If advertising can get Swing Shoppers to increase their spending on locally grown food, then the base of Committed Shoppers will increase.

PSB analyzed results from the study separately for the Swing Shopper and Committed Shopper so that conclusions could be drawn about this important group.

Demographics and Shopping Patterns of Swing Shopper

The Swing Shopper is more likely to have a slightly lower household income, less education, and more children (based on household size) compared to All Shoppers and Committed Shoppers. They are more likely to be Baby-Boomers (ages 35-49) and also shop less frequently (perhaps avoiding the number of times they have to take their kids to the store).

Little difference was found between the Swing Shopper and All Shoppers and Committed Shoppers in terms of gender, household location (Springfield vs. 3 counties), or the amount they spend on groceries each month.

Messages

As mentioned in the executive summary, a campaign that stresses local benefits, freshness, and convenience will work very well with the Swing Shopper as well as the Committed Shopper (and the general public);

- *Buying locally grown food greatly contributes to the economy* is more effective among Swing Shoppers than the general public and is extremely effective for the Committed Shopper.
- *When you buy locally grown foods you are supporting your neighbors* is much more effective among both the Swing Shopper and Committed Shopper than the general public.
- *When you buy locally grown food you are helping to preserve the rural character of your region* is not more effective among the Swing Shopper than the general public but is very effective among the Committed Shopper.
- *Locally grown food usually tastes better* is not more effective among the Swing Shopper than the general public but is much more effective among the Committed Shopper.

Reasons to Shop for Locally Grown Food: Swing Shoppers

Freshness is by far the most important reason cited by Swing Shoppers to buy locally grown food. Supporting the local economy was second, and quality and taste were fourth and fifth. This confirms the conclusion among All Shoppers that messaging must reinforce and remind people about the benefits of freshness and taste of locally grown foods.

Reasons NOT to Shop for Locally Grown Food: Swing Shoppers

Perceived Inconvenience is extremely important to the Swing Shopper. This is a group that, by definition, will buy more locally grown food if it is more convenient to obtain. Also worth noting is that more than one-third (38%) of Swing Shoppers cited lack of selection as a major reason not to buy locally grown food. Perhaps there is an assumption that you cannot buy locally grown food at a grocery store.

The following pages provide more details on Swing Shoppers:

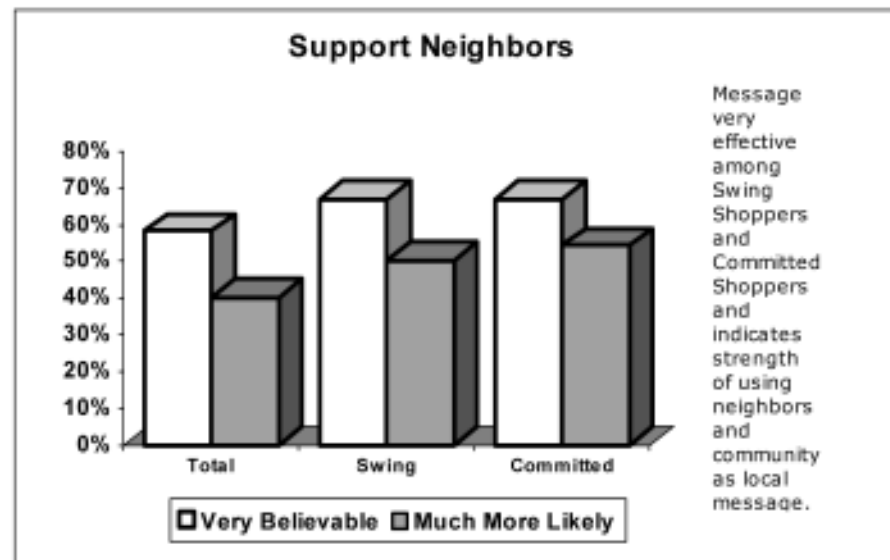
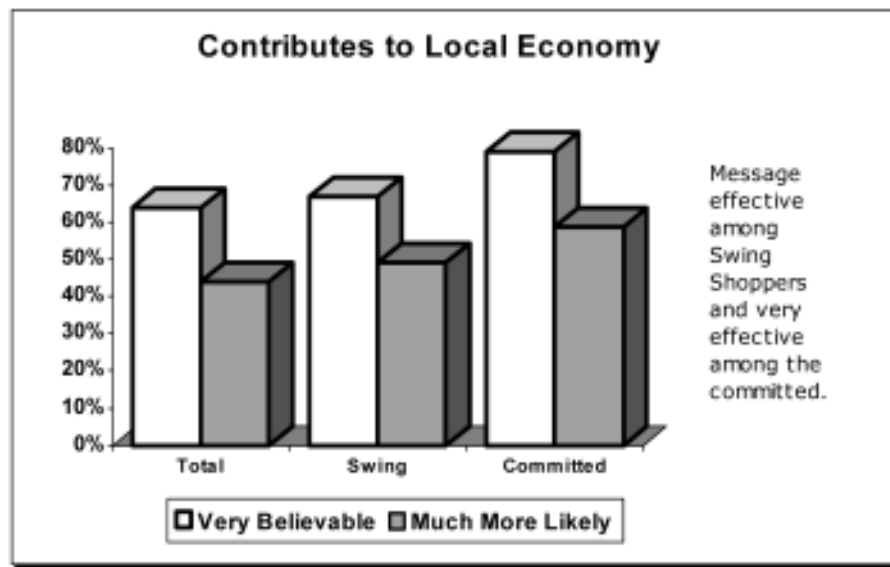
- Page 17: Table outlining differences in demographics and shopping patterns among Swing Shoppers, Committed Shoppers, and All Shoppers.
- Page 18: Charts outlining differences between Swing Shoppers, Committed Local Shoppers, and All Shoppers on two messages: Contributes to the Local Economy and Supports Neighbors.
- Page 19: Charts outlining differences between Swing Shoppers, Committed Shoppers, and All Shoppers on two messages: Preserve Rural Character of Region and Tastes Better
- Page 20: Charts that provide information on the top reasons Swing Shopper BUY and DO NOT BUY locally grown food.
- Page 21: A chart outlining the percentage of Swing Shoppers who seldom or never shop at outlets selling locally grown food and three additional charts which depict the top obstacles.

Demographics & Shopping Patterns of Campaign Targets

Differences between the "Swing" and "Committed" targets are outlined below.

Gender Female Male	Total 33% 67%	Committed 35% 65%	Swing 33% 67%
Habitat Rural Springfield	Total 55% 45%	Committed 54% 46%	Swing 52% 48%
Age 18-24 25-34 35-49 50-64 65+	Total 6% 15% 31% 21% 22%	Committed 10% 12% 32% 24% 19%	Swing 6% 15% 38% 19% 17%
Income <\$34,999 \$35-\$49,999 \$50-\$74,999 \$75,000+ DK/Refused	Total 34% 21% 16% 8% 21%	Committed 29% 25% 16% 7% 23%	Swing 38% 21% 15% 6% 20%
Education No High School HS Graduate Some College College Graduate Graduate School DK/Refused	Total 7% 32% 19% 26% 11% 5%	Committed 6% 25% 20% 33% 11% 5%	Swing 13% 32% 19% 17% 14% 5%
Household Size One Only Two Three+	Total 20% 37% 37%	Committed 17% 38% 38%	Swing 20% 32% 43%
Mo. Grocery Bill <\$151 \$151-\$299 \$300+ DK/NA	Total 30% 34% 29% 6%	Committed 36% 30% 33% 2%	Swing 32% 37% 30% 2%
How Often Shop >Once a Week Once a Week Every 2+ Weeks	Total 34% 44% 21%	Committed 29% 48% 22%	Swing 27% 38% 33%

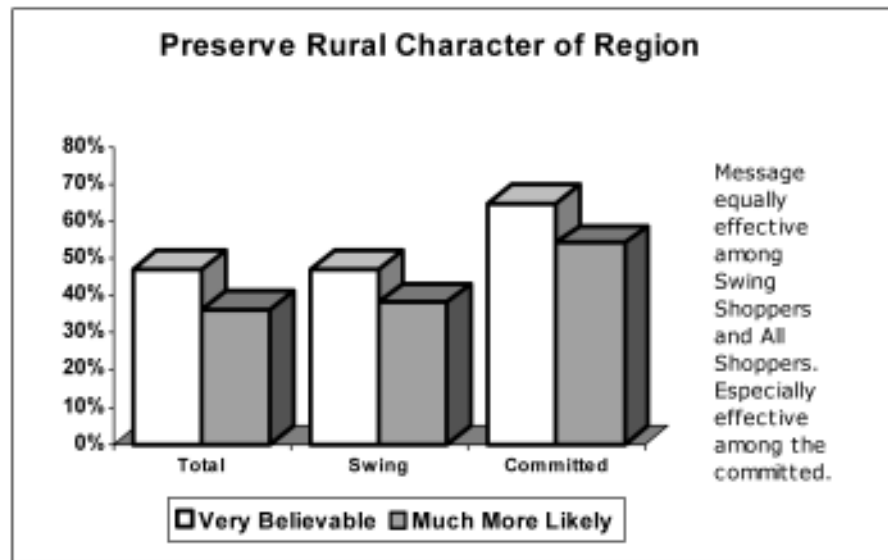
Messages: Swing Segment Compared to Committed Base and All Respondents⁶



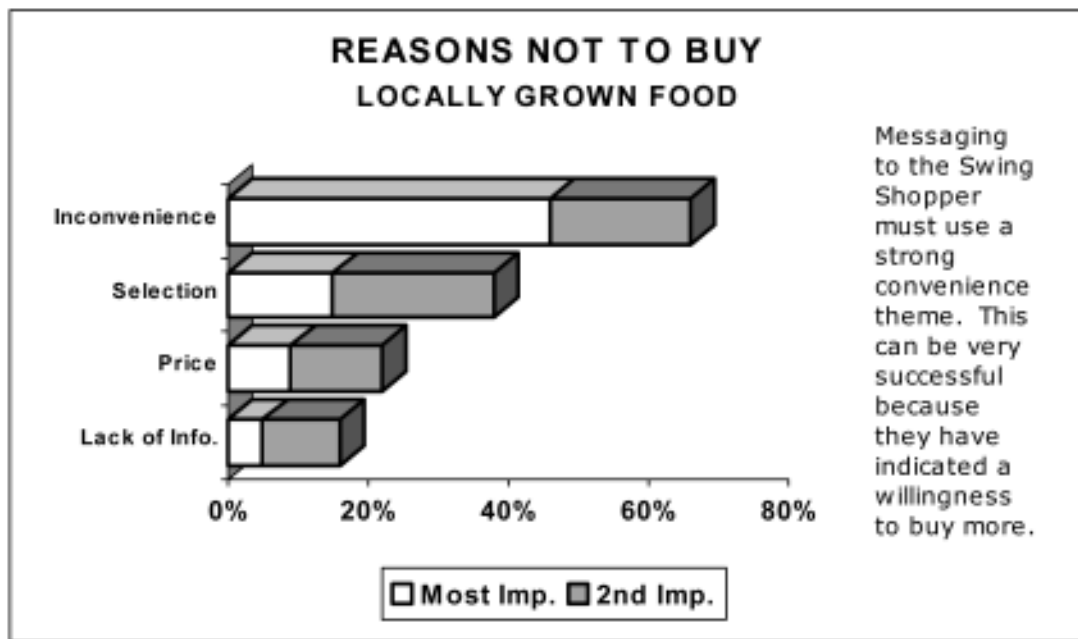
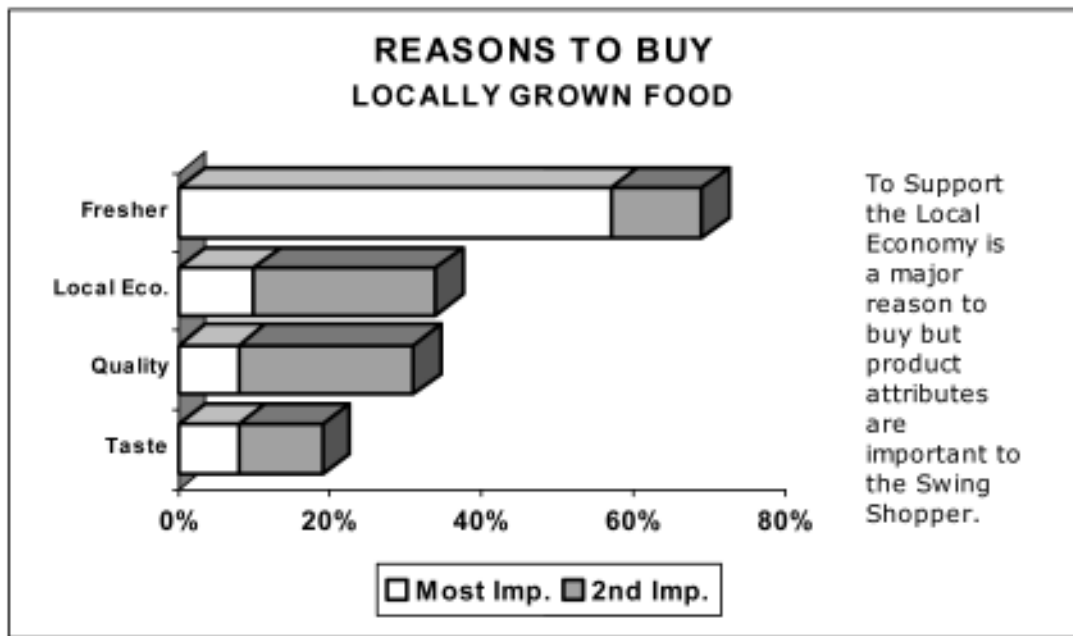
⁶ First Chart: percentage of Swing Shoppers who seldom or never shopped at:

- Community Supported Agricultural Farms (CSAs)
- Food Cooperative (Coops)
- Small Independent Groceries (Ind Gr)
- Farmers' Markets (Markets)
- Road Side Stands (Stands)

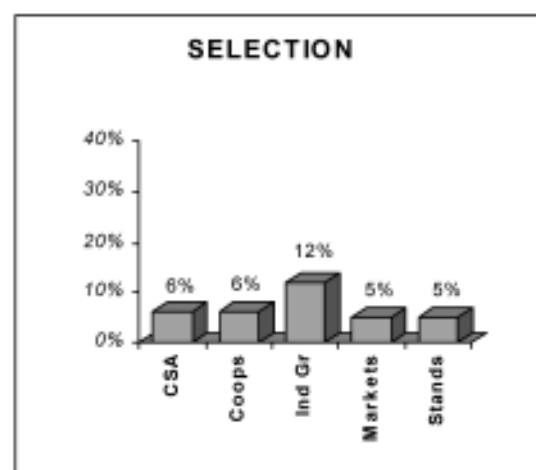
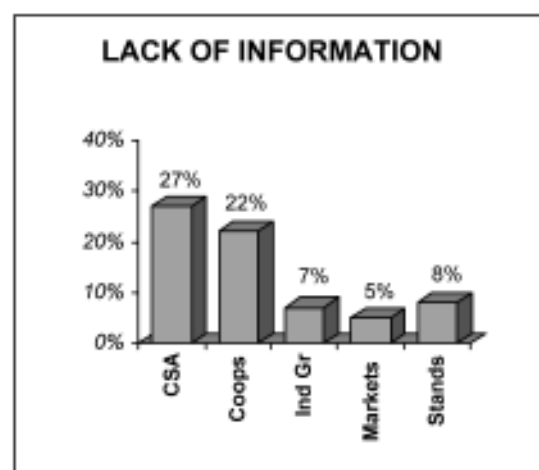
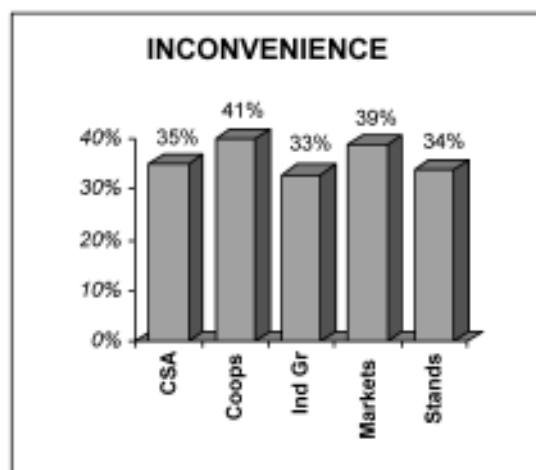
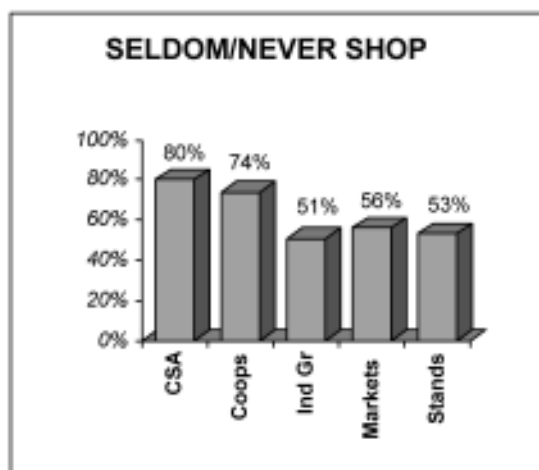
Second, Third, and Fourth Charts: major reasons not to shop among Swing Shoppers who sometimes, seldom, or never shop at location.



Swing Segment: Major Reasons to Buy and Not to Buy Locally Grown Food



Swing Segment: Obstacles to Shopping at Food Outlets



E. CONCLUDING THOUGHTS

High Interest But Low Awareness and Insufficient Call to Action

Grocery shoppers think that it is important that foods are grown locally. There is widespread agreement that locally grown foods are fresher, taste better, are of higher quality (especially among Swing Shoppers) and, if they cost a little more, are worth the extra cost. Findings indicate that the obstacles in increasing the sale of locally grown foods are two-fold:

1. Perceived inconvenience is clearly the major obstacle but this reflects a lack of awareness on where to buy and how to identify locally grown foods. Advertising must address the convenience issue and grass-root efforts are needed to make the available and importance of locally grown food more top-of-mind.
2. Shoppers believe that product attributes (i.e. freshness, taste, quality, etc.) of locally grown food are superior but this is a latent belief that in and of itself is an insufficient call to action to affect purchase behavior and overcome perceived inconvenience of buying locally grown food. Even if advertising focuses on convenience, a call to action is needed that supplies new and believable information to the consumer and gives them a reason to act. Messaging that stresses the local benefits (economy, neighbors) is the activator.

Finding Demonstrate the Efficacy of Partnerships

Although survey results provide a clear direction for a successful campaign, lack of available resources, manpower, and funding can hamper its implementation. Pursuing partnerships with larger supermarkets and local business can help.

Supermarkets

Findings show that there is a large potential for supermarkets to make money and earn corporate goodwill by selling clearly labeled, locally grown food. Targeted communications to supermarkets to enlist them as partner must highlight the most salient findings:

- a. The perception that it is inconvenient to buy locally grown food is strong.
- b. Convenience of shopping location is *very important* when buying food.
- c. Inconvenience is the most important reason why people seldom or never shop at farmers' markets, food cooperatives, road side stands, community supported agricultural farms, and small independent groceries.

Nearly nine in ten grocery shoppers agreed that they would buy more locally grown foods if they were convenient to obtain. Supermarkets offer convenience – over 90% of consumers do the majority of their grocery shopping at supermarkets.

- d. There is a lack of information about where to buy locally grown food and how to identify it.
- e. Less than half of grocery shoppers identify locally grown food by its *labeling* (labels on products or sign that states it is locally grown).

Nearly 80% of grocery shoppers said they would buy more locally grown food if they were clearly labeled as local. Coupled with lack of information, this finding suggests that consumers have difficulty identifying locally grown food and that supermarkets could greatly increase sales by creating clearly labeled locally grown food sections.

Supermarkets (continued)

- f. Newspapers can serve as an effective advertising and communicating vehicle.
- g. Readership of major and smaller newspapers is high in Springfield and in the 3 counties of Franklin, Berkshire, and Hampshire is high.

Only 12% of grocery shoppers have ever used coupons to buy locally grown food but half have said they would be more likely to buy it if they could use coupons. This finding demonstrates that supermarkets could effectively leverage their newspaper advertising and supplements to offer coupon-like inducements to increase sales.

Local Businesses

Communications to local businesses should highlight the fact that serious research was conducted that shows that a sophisticated advertising campaign can be successful. Make it real to them by providing them with a slogan that captures the following: *Support your local economy and neighbors by buying locally grown food that's fresher and tastes great. Available at many locations throughout your area. For more information. . .*

The local economy theme could resonate well and provide businesses with the opportunity to position themselves as good corporate citizens. Good candidates would include:

- Supplier of agricultural products
- Companies involved in the production and sale of groceries
- Large area employers who are likely to benefit most from publicity

It is important to not forget that local businesses may be interested in sponsoring the campaign on an in-kind basis by supplying services as opposed to funds. This approach greatly extends the number of potential business partners.



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This summary highlights the major findings of a telephone study conducted by Penn, Schoen & Berland Associates, Inc. in early January, 2002.

The major conclusions of the poll are as follows:

1. Awareness of the *Be a Local Hero* campaign continues to be high after three years and recall of the major theme and slogan has actually increased.
 2. Resident of Western Massachusetts are favorable to the campaign and believe it makes a convincing case for buying locally grown food.
 3. Sustained success with the campaign requires the continued use of mutually reinforcing advertising and promotions vehicles.
 4. Cause-related marketing is important: creating linkages with larger goals such as protecting the environment and maintaining personal well-being increases the success of the campaign.
 5. It is important to continue the local message of the campaign in Western Massachusetts so that residents are kept aware of the benefits of buying locally grown food and because the campaign is influencing local buying of other goods and services.
- 1. Awareness of the *Be a Local Hero* campaign continues to be high after three years and recall of the major theme and slogan has actually increased.**

Unaided awareness of advertising for locally grown food remains steady.

- Nearly 8 in 10 residents (78%) recall seeing or hearing something about a campaign for locally grown food. This figure is virtually identical to findings from a year ago (79%).
- Awareness is higher among residents of Northampton than the other targeted areas.

Recollection of the specifics of the *Be a Local Hero* campaign is impressively strong.

- Nearly 3 in 4 (74%) said they remembered advertising specific to the *Be a Local Hero* campaign—a 10 point gain since December 2000. At 21%, “Buy locally grown” topped the list, followed by “Be a local hero” at 16%.
- “Support the local economy” and “support your/my neighbors” continue to be the major themes associated with the campaign (39% and 22% respectively).
- Recall of the slogans for the campaign has improved with each wave. This year, nearly half (46%) of the respondents cite “Be a Local Hero” or “Buy Locally Grown” as the slogans of the campaign. In December 2000, 37% remembered one of these two slogans.

In most cases, the organizations responsible for advertising campaigns receive little recognition. However, unaided, 9% can name CISA as the sponsor for *Be a Local Hero*.

Like last year, aided awareness is highest for newspaper ads, point of purchase signs, and bumper stickers.

- More than 4 in 10 residents remember seeing newspaper ads promoting locally grown food (41%) and point of purchase signs (41%).
- Nearly 4 in 10 residents (37%) remember seeing bumper stickers.

2. Residents of Western Massachusetts are favorable to the campaign and believe it makes a convincing case for buying locally grown food.

High favorability towards the *Be a Local Hero* campaign explains why most respondents believe that advertising influenced their decision to buy locally grown food.

- More than 8 in 10 residents (85%) are favorable to the advertising campaign, with more than half (52%) describing themselves as VERY favorable. Favorability is highest among residents of Franklin county (90%).
- More than 8 in 10 residents (83%) say that advertising makes a convincing case for buying locally grown food – 39% say it is VERY convincing. Nearly 9 in 10 Amherst and Northampton residents (88% for both) believe advertising offers a compelling reason for buying locally grown food.
- Nearly two-thirds of residents (65%) say that advertising had an impact on their decision to buy locally grown food.

3. Sustained success with the campaign requires the continued use of mutually reinforcing advertising and promotions vehicles.

The major reason the campaign has been successful is that residents are exposed to many different kinds of advertising that is displayed in numerous venues. Without the benefits of television advertising, it is difficult to capture the attention of consumers. People may notice an ad for locally grown food in a newspaper, for example, but they may not recall it because they are exposed to so many competing messages and ads. But if they then see a bumper sticker or a promotion at a grocery store that reinforces the same message using a different medium, recall will be much higher.

Poll results show this to be the case. Less than half of residents have recall of any one specific advertising or promotional vehicle, but over 4 in 10 (41%) remember seeing an ad in a newspaper and a poster or point of purchase sign in a grocery store. Additionally:

- More than 1 in 3 residents (37%) recall a bumper sticker that says Buy Locally Grown and 16% of residents recall seeing promotional events. An additional 12% of residents recall seeing bus advertising as well as farm guides or handouts.

Multiple exposure to the message is working in Western Massachusetts.

4. Cause-related marketing is important: creating linkages with larger goals such as protecting the environment and maintaining personal well being increases the success of the campaign.

In general, residents are deeply concerned about the goals CISA strives to accomplish.

- Nearly 7 in 10 residents (68%) are very concerned with *protecting the environment*. This is especially the case in Northampton (80% very concerned).
- Nearly two-thirds of residents (65%) are deeply concerned with *maintaining the open spaces and the scenic beauty of the Pioneer Valley*.
- 63% of residents are concerned with *eating healthy to maintain personal well being*.

Furthermore, top-scoring issues of concern are also top drivers in purchase intent. A marketing strategy that highlights the casual relationship between buying locally grown food and having a healthy living environment resonates well.

- More than 8 in 10 residents (85%) are more likely to buy locally grown food if it *will protect the environment*, with a majority (54%) saying they would be much more likely.
- More than 8 in 10 residents (84%) are more likely – 56% much more likely – to purchase if it means *eating better to maintaining their personal health*.
- More than 8 in 10 residents (81%) are much more likely – 53% much more likely – to buy locally grown food when it *maintains the open spaces and the scenic beauty of the Pioneer Valley*.

5. It is important to continue the local message of the campaign in Western Massachusetts so that residents are kept aware of the benefits of buying locally grown food and because the campaign is influencing local buying of other goods and services.

Polling conducted over the past 3 years demonstrates conclusively that the Local Hero Campaign has led to increased awareness among residents of Western Massachusetts of the local benefits of buying locally grown food. The most recent study strongly supports the conclusion that residents believe it is important to continue the advertising in order to keep the “local” message loud and strong in the market.

- Nearly 9 in 10 (86%) believe that it is important to continue running ads for the Local Hero Campaign so that people know about the local benefits of buying locally grown food. This clearly indicates that people want the local message – as a motivator – reinforced.
- In fact, 6 in 10 (60%) residents that if the ads were stopped, people would be *less likely* to buy locally grown food because they were no longer exposed to the local message of the Be a Local Hero Campaign.

Perhaps more significantly, residents recognize that the local message has impact over and beyond their food buying habits.

- A large majority of residents (57%) believe that that the Be a Local Hero Campaign has caused people to more seriously consider buying other goods and services, not just locally grown food, from local businesses.

Chapter 8:

Designing Your Communications Plan

Planning your campaign's communications efforts can be a very exciting process. Your communications work is a way to present your issue to the community, to engage them and call them to action. No matter what your budget, good planning is central to a strategic, well-organized communications effort. We hope that this chapter gives you some ideas for how to plan well. Keep reading if you're interested in:

- A step-by-step guide to strategic communications planning
- Things to keep in mind as you get started
- Tips for economizing
- Suggestions for working with the media
- Ideas for involving your community
- A list of resources for further learning

You'll find more information on budgeting for your communications work in chapter 2, Planning and Budgeting.

Given the challenges that Community Involved in Sustaining Agriculture (CISA) experienced when planning our own communications work, we encourage you to take your communications planning seriously. Give yourself enough time to do it well. Avail yourself of outside expertise if you can, particularly if you haven't communicated on this scale before. You may find yourself on a very steep learning curve (as we certainly were), especially during the first year of your campaign. A well-thought out communications plan can position you for smoother implementation, better results and fewer sleepless nights.

THE EIGHT BASIC STEPS OF STRATEGIC COMMUNICATIONS PLANNING

As Margaret's story reflects (see sidebar), having a well-organized plan for your communications work is critical. What follows is a step-by-step communications planning guide. It was provided by the communications firm used by FoodRoutes Network (formerly Fires of Hope), Vanguard Communications in Washington, D.C.




HOW NOT TO MANAGE THE MEDIA: A LESSON IN LEARNING WHAT YOU DON'T KNOW

Margaret Christie, former executive director of CISA, recalls:

In the spring of 1999, CISA sent out a news release saying we were going to do the campaign. Our staff had had basic media training and we knew we should do a news release. But the release wasn't connected to any broader package of communications or an event. After getting our release, a local farm reporter went to his usual ag contacts and farmer friends to get their take on our not-yet-unveiled campaign. Much to our chagrin, they said the campaign sounded like a lousy idea! The reporter's article printed their opinions and mentioned that we were using several non-local communication consultants. We got bashed twice in one article.

This experience showed us that we knew a little, but not enough. We knew enough to send a news release, but we didn't know how to get the media to say what we wanted them to say. We didn't anticipate that tapping flashy Washington, D.C., consultants was a good message for some audiences, but might be counterproductive for a local one. And we weren't very savvy at delivering our message so that the audience picked up just that message and not other things.

The lesson for us: plan ahead. Prepare a very clear, consistent, simple message and stick to it. Integrate your various communications efforts so that appropriate messages are the ones that get heard.



Your messages. . .
deliver important
information about the
issue and compel the
targeted audience to
think, feel or act.

We hope it will give you a helpful framework for developing the communications plan for your Buy Local program.

1) Determine Your Goal

To initiate a successful and effective communications effort, start with an assessment of your current program goals. Examine what your program stands for—its mission, values, and beliefs. Look closely at who your program is serving. This process will help narrow and sharpen the focus for your communications initiative(s).

- What issue is most important to your program right now?
- Who is most affected by this issue?
- Who makes decisions about this issue?
- What is the overall goal you want to achieve?
- What tangible outcomes would you like to achieve through a communications effort?
- How will you know you are achieving your goals?

2) Identify and Profile Your Audiences

Once you've identified your key issues, it's time to identify and profile specific audiences to target with a communications initiative. This kind of background information is essential in choosing the most effective ways to communicate with the audience. Madison Avenue has learned this lesson well, now we need to apply some of the same kind of thinking to communicating about your issue.

Think about the answers to the following questions, as they pertain to your Buy Local campaign:

- Whose knowledge, attitudes, and behavior must be changed in order to meet your goal? (These groups now become your primary audiences.)
- Who else is affected if you succeed in your goal? (These groups are your secondary audience.)
- Are there others who can influence primary and secondary audiences? (You may see a role for these folks as allies and partners.)
- What do you know about this audience's

knowledge, attitudes, and behaviors as they relate to your issue?

- What are the barriers to this audience fully supporting or participating in reaching your goal? What are the benefits if they do?
- What are the characteristics of this audience? How do they spend their time? What are their gender, ethnicity and income level? How have they been educated? What are the language considerations? What or who are they influenced by? What makes new information credible for them? What or who could motivate change or action?

3) Develop Your Messages

Your messages are closely tied to your goal and objectives. They deliver important information about the issue and compel the targeted audience to think, feel or act. They should:

- Show the importance, urgency, or magnitude of the issue
- Show the relevance of the issue
- Put a "face" on the issue
- Be tied to specific values, beliefs, or interests of the audience
- Reflect an understanding of what would motivate the audience to think, feel, or act
- Be culturally competent
- Be memorable

The messages you develop can become the underlying themes for your materials and activities. You may develop slogans based on them. You may develop sets of talking points that members of your team will use in making presentations. And they easily become the basis for radio and print public service announcements (PSAs), the genesis for posters, and may suggest topics for fact sheets, drop-in articles, and even letters to the editor or newspaper editorials.

Regardless of the purpose, messages must be developed with consideration of the desired outcome. Factors that help determine public acceptance include:

- Clarity
- Consistency
- Main points

- Tone and appeal
- Credibility
- Public need

Prior to final production, messages should be pre-tested with the target audiences (and in some cases with channel “gatekeepers”) to assure public understanding and other intended responses.

4) Select Channels, Activities and Materials

Communications channels carry the messages to the target audiences. Channels take many forms and there is an infinite list of possibilities. Answering some key questions will aid you in identifying the most effective channels for reaching your audiences:

- Where or from whom does this audience get its information?
- Who do they find credible?
- Where does this audience spend most of its time?
- Where are they most likely to give you their attention?

Sample Channels:

Television stations
Radio stations
Newspapers
Web sites
Community centers
Local festivals
Laundromats
Local government offices (e.g., Division of Motor Vehicles, post offices)
Malls
Parks
Schools
Colleges
Libraries
Vocational and language training centers
Recreation centers (e.g. basketball courts or soccer fields)
Community nonprofit offices
Transportation depots/stations
Supermarkets
Fast food restaurants
Literature racks
Video rental stores
Beauty/barber shops
Gas stations
Movie theaters

What are the activities, events, and/or materials—to be used in your selected channels—that will most effectively carry your message to the intended audiences? In choosing these, you should consider:

- Appropriateness to audience, goal, and message
- Relevance to desired outcomes
- Timing
- Climate of community toward the issue/activity
- Costs/resources
- Cultural competence (including language)
- Environment—geographic considerations

Sample Activities:

News conferences
Newspaper editorial board meetings
Radio talk or call-in shows
Benefit race
Parades
Web site links
Conferences
One-on-one meetings
Open houses
Speeches
Hotlines
Listserves
Information fairs
Family gatherings

Materials to Support Activities:

News releases
Fliers and brochures
Opinion editorials (op-eds)
Letters to the editor
Posters
PSAs
Bookmarks
Video presentations
Web pages
Parade floats
Buttons, pins, and ribbons
Bumper stickers
Promotional items and giveaways

5) Establish Partnerships

Groups, organizations, or businesses may exist that would aid you in reaching your goal by providing funds, expertise, support, or other resources. List allies or partners who support or work with your audiences or share in your goals. Make your community partners part of your team.



Answering some key questions will aid you in identifying the most effective channels for reaching your audiences.

6) Develop and Pre-test

- Develop prototype
- Review and pre-test
- Revise and refine
- Produce

7) Implement the Plan

There are many tools for organizing yourself around time, dollars, and staff needed to implement an initiative. Of course you should feel free to use your own tried and true management tools. Here are some tips for determining your resource needs:

1. List all activities.
2. Under each activity, outline the steps, in order, that will lead to its completion.
3. Assign a budget estimate to each step.
4. Assign a staffing needs estimate to each step.
5. Working backwards from the activity completion point, assign a date for each step in the activity.

8) Evaluate and Make Mid-Course Corrections

- Develop an evaluation plan for your communications program (preferably at the same time that you develop your communications plan).
- Develop systems and tools for tracking the effectiveness of your communications work.
- Establish a timetable and assign responsibilities for the evaluation of your communications program.
- Assess the strengths and weaknesses of individual communications tools and your overall communication strategy.
- Revise your approach accordingly.

For more information on evaluation, see chapter 11.

THINGS TO KEEP IN MIND AS YOU GET STARTED

- **Do you have a coherent communications package?** Communication efforts are most effective when the various communications tools fit together, reinforce one another, and add up to a complete package. You want your communications efforts to be

greater than the sum of its parts, so really explore how to develop a comprehensive, well-designed package.

- **What will it cost?** What are your options for getting radio ads aired, or newspaper ads placed? How much can you rely on free media, community events and the help of volunteers to get your message out? We found that the cost of paid media (and media consultants) was higher than we'd expected and that prioritizing communications activities is essential.
- **How should your communications work be sequenced?** Will you use a variety of communication tools simultaneously or introduce some before others? What preparation will be needed as various communications efforts are initiated? For instance, what legwork should you do to ensure that retailers are prepared to use your point-of-purchase (POP) materials as soon as your ads begin hitting newspapers or the airwaves? What groundwork do you need to lay with reporters in your area so that they will attend your launch and other community events?
- **How will you staff your communications work?** CISA created the position of campaign coordinator in the first year of the campaign. This staff person was responsible for ensuring that all aspects of our communications—from ad design and placement to farmer and retailer recruitment—were implemented according to schedule. This was an exceptionally challenging position, especially in the first year of the campaign. This staff person was constantly pushed and pulled in different directions and had a huge workload. You will find a job description for this position in the attachments, on page 77.
- **Are your spokespeople ready to roll?** Before you ask the media to talk to you, it's important to decide who's going to talk to *them*. Choose people who are well-versed in your issues and can accurately represent your Buy Local program and its messages. Reporters usually prefer to speak to the person in charge, so you may want to make that a factor in your decision. You also may want to choose representatives who can speak personally about growing or selling locally grown food. Farmers tend to have great

Communication

efforts are most

effective when the

various

communications

tools fit together,

reinforce one

another, and add up

to a complete

package.



credibility, but you may need to train them as spokespeople to be most effective. Before sending your spokesperson to do interviews, conduct an in-depth, mock question-and-answer session to prepare him or her for the meeting.

- **Do you have good message discipline?** Communicating a clear, concise, consistent message is a key to success. And as your campaign attracts attention, your work will likely come under more scrutiny. That makes it essential for all of your spokespeople (whether they have that role formally or informally) to know what message to deliver and to have appropriate answers to difficult questions. Better to be prepared than wing it and then need to do damage control.
- **What adjustments might you need to make?** As CISA's campaign got rolling, we found that we needed to revise some of our newspaper ads, POP and other materials, and our approaches for getting them into public view. Anticipate that you'll probably need to revise some of your tools and that you may need considerable staff time to manage that process.
- **What is your process for making decisions?** Have your Buy Local team agree early on to a manageable process for making decisions about your communications work. Having a good process in place can help you manage last minute demands by busy board members and designers working on tight deadlines.
- **How will you evaluate your progress?** How will you assess the effectiveness of your communications work? What information do you need to track? Your evaluation can help you best if you think about it early in your program's development and get the needed systems in place before your campaign is in full gear. For more on these issues, see chapter 11.

SUGGESTIONS FOR WORKING WITH THE MEDIA

The local media are likely to be resources for you as your campaign gets underway. Here are a few ideas to help you work effectively with the media.



TIPS FOR ECONOMIZING

There are a lot of ways to use your resources on communications, so you'll undoubtedly need to economize. Here are a few tips on stretching your communications dollar.

Recruit Flagship Stations

Establishing "flagship media" can ensure that your campaign's message is being promoted by at least one television and/or radio station in the community. When an outlet signs up as a flagship for your media effort, it normally agrees to report regularly on your activities and get involved in community relations for the effort. Why would a station want to be a flagship? Most media devote some airtime or advertisement space to public service, so they are constantly on the lookout for important community projects that they can promote. If an issue has widespread public support, media, particularly radio and television, like to be seen as supporters too.

In order to avoid alienating other stations in your area, it's important that you limit your exclusive "flagship" relationship to feature news. This way whenever you have a truly hard news story, all of the media in town can have equal access to it. Contact the public affairs person at the station to inquire about establishing a partnership.

Use Consultants Judiciously

When you contract with consultants, make sure to include clear language that spells out their responsibilities, your responsibilities, their pay, and the duration of the contract. Specify the products that will be produced, the formats they will be produced in and the deadlines for production. Put everything in writing, especially any changes or amendments to the contract. And don't be afraid to ask contractors to submit detailed reports of their work on a regular basis. Also make sure that graphic designers and others give you deliverables in an electronic format that you can edit yourself rather than paying for their time to make revisions.

Build In-House Skills

You may find that cultivating new skills among your staff and volunteers is more cost effective than relying perpetually on outside graphic designers, Web site programmers, etc. Consider hiring a consultant to do most of the newspaper ad placement in year one, for instance, but also have them teach you so that you can bring some functions in-house thereafter. Also, skills like desktop publishing might be applied to tasks like Web site development and production of your farm guide and newsletter. Moving the work in house isn't always feasible, but it's worth considering.

Handle Your Own Photography

A \$600 digital camera and a good amateur photographer can save a lot in professional fees. Consider using homegrown photos for your newsletter and Web site and paying a professional photographer to take pictures only for newspaper ads and other materials that call for higher quality photos.



TIPS FOR ECONOMIZING (CONTINUED)

Hire an Intern

Consider approaching a local college or university about hiring students as interns to work on your campaign. Many colleges require their students to complete internships or volunteer projects to graduate. Photography and graphic design students can help with your materials. Marketing, business, public relations and advertising students could help with communications planning, media outreach, market research and evaluation. Students can also help staff your events, make follow-up visits to stores that agreed to display your POP materials, and assist with office administration.

Evaluate, Evaluate, Evaluate!

Campaign evaluation will be explored in detail in chapter 11, but remember that evaluation can tell you not only what is working and what isn't, but also how you could better use your campaign funds. For instance, after CISA's year one evaluation we stopped placing ads on buses and sending out direct mail. Instead, we redirected that money to newspaper and radio advertising, which were shown to generate greater awareness of our campaign.

Develop Relationships with the Media

Local newspapers are typically on the lookout for positive local news, and you should work diligently to ensure that they know what you are up to and why your Buy Local program is important to their readers. Anticipate that radio news departments, however, will vary in their commitment to generating their own local news stories.

Be sure to pay attention to which reporters are picking up your news releases and story ideas. Give them a "heads-up" phone call when you are getting ready to send out a news release or farmer profile. Ask them what interests them about your program so you can be sure to feed them information when it becomes available. Some reporters appreciate getting the "scoop," but be careful that you don't exclude other opportunities by relying on just one reporter to get your information out to the public.

If you are fortunate enough to have a station with a commitment to local news, develop a good relationship with them. However, CISA has found that local TV stations have a spotty commitment to rural issues, especially if you

are located near an urban center. One way to increase the chance of getting TV coverage is to invite a local news anchor to serve as emcee at one of your events or invite the meteorologist to broadcast from an event.

Say Thank You

Gestures like sending reporters a thank-you note after a well-written story are important for building and sustaining media relationships. Some reporters need to advocate for your events or issues within their organization, and a "thank you" (perhaps accompanied by one of your nifty Buy Local T-shirts) can convey how much you appreciate their interest.

Send Targeted Stories

CISA has found that providing our own feature stories (beyond what we'd include in a typical news release) can lead to detailed coverage of local farming. We write one to two page "farmer profiles" about local farms—history, products, hopes and dreams—and send them to local reporters as a way to pique their interest in a specific farm or story idea. On several occasions, reporters have either used the information as the impetus to create a more detailed story, or printed our story without significant changes.

When thinking about whom to send your releases or story ideas to, think creatively. Editors, producers and reporters are always looking for new ways to present their stories or to put a local spin on national events. Columnists and special interest reporters (those who cover things besides straight news: lifestyle, food, agriculture, business, health, etc.) can bring your message home to loyal audiences who are actively seeking information on your topic. Repeating your story with various angles can help you get multiple placements and keep local agriculture issues in front of people in your community.

Hold Events and Get the Media to Participate

Don't be shy about staging events or giving awards to get attention. In the best of all worlds we would get great coverage because our work is important, but that often isn't the way it goes. One way to get more coverage is to have local restaurants donate

dishes made with locally grown food for your campaign launch event. The reporters will love the food and the restaurants will love the free publicity. Another option is to stage an awards ceremony to commend retailers that have sold locally grown products, as we did at our kickoff. While they can be time-consuming to arrange, the possibilities for low cost, interactive events are endless.

Write a News Release

News releases can be a terrific, low-cost tool for any Buy Local program and they can be a great way to get the media interested in your work. Here are a few pointers to help make sure your news release stands out.

Format

- Make headlines **bold** instead of ALL CAPS.
- List a contact person and his or her office phone number in the upper right-hand corner of the page.
- Type “FOR RELEASE [date, time]” in the upper left-hand corner of the page.
- For news releases issued in advance of breaking news, type “EMBARGOED FOR RELEASE [date, time]” in the upper left-hand corner of the page.
- If longer than one page, type “-more-” at the bottom of every page.
- Type “—30—” or “###” at the end of the final page.
- Put shortened title and page number in the upper-right hand corner of the second page and on.

Copy Content

- Use inverted pyramid writing style, stating facts in descending order of importance.
- Write in the active voice and use short sentences and paragraphs.
- Try to keep it one page.
- If possible, follow Associated Press Stylebook rules.
- Every time you start a new topic, start a new paragraph.
- Proofread your release.

First Paragraph

- Answers ‘what is news’ using the five W’s (Who, What, When, Where, and Why).
- “Hooks” the reporter into reading the rest of your release by isolating the most interesting aspect of your subject.
- Is direct and short and doesn’t include the name of an unknown unless it is written as a feature story.

Second Paragraph

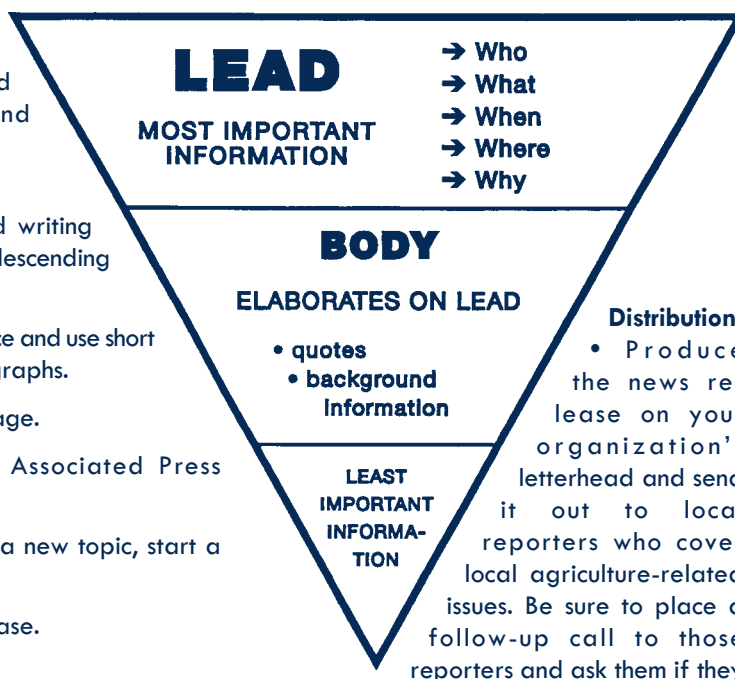
- Amplifies the lead, expanding on the information provided in the lead.
- Answers anticipated questions that you hint at in the lead.
- Reveals the name of the organization issuing the news release.

Third Paragraph

- Includes a quote from an organization representative or third party. This quote endorses the news release message.

Final Paragraphs

- The following paragraphs provide more detail to the reader in descending order of importance. Therefore, don’t put information in the last paragraph that you want to get used. Editors may only read the first few paragraphs.
- The final paragraph should include background information about your organization (major purpose campaigns, membership size, and nonprofit status).



One way to get more coverage is to have local restaurants donate dishes made with locally grown food for your campaign launch event.

would like additional information.

- Put a copy of the news release on your Web site, so that reporters who did not receive it or misplaced it can still get the information.

A Few Words on QUOTES

- Refine quotes grammatically. Make sure they use appropriate grammar.
- Quote source should be placed in a natural break (at the end of the sentence.)
- Source should always have “said” not “says” or any other description.
- Don’t put one quote directly after a quote from another source unless one is responding to another. (In this case, reverse the order of where you name the source.)



WHAT IS NEWSWORTHY?

If your “news” is not really newsworthy, even the best-written news release will get tossed. Make sure your release features an event, a result or a story that is of compelling interest to the community. So, what is newsworthy?

- Something new, that no one has ever said or heard before.
- Something timely—yesterday’s news is old news.
- Something that involves a public figure, a celebrity, or a well-known organization.
- Something unusual or ironic.
- Something with a human-interest angle.
- Something visual (for television and photography).
- Something that centers on an event or happening.
- Something that affects a large number of people.
- Something that is a variation of a theme already receiving media attention.
- Something interesting on an otherwise slow news day.
- Something that benefits a large number of readers, viewers, or listeners.
- Something that is a threat or danger to the community.
- Something that pulls at people’s “heart strings.”

Each of these elements alone may not make your story newsworthy. But if several apply, you probably have a story worth pitching to reporters.

- If you don’t have a title for the source, use, for example, “Joe Smith of Organization Name.”
- Source titles: short titles for a name go first and long titles go last. (e.g., Executive Director Joe Smith versus Joe Smith, Organization Name executive director).

IDEAS FOR INVOLVING YOUR COMMUNITY

Involving members of your community in your Buy Local program is key to near-term success and sustained impact. When you consider activities and events for engaging them, ask yourself: Will it help us reach the goals of our campaign? Will it reinforce or complement our ongoing activities? Will it provide an entry point for a wide variety of people to participate in your program? Think about the timing of your activity. And be sure you’ve considered the cost—in terms of both time and money—an event may involve.

Here are handful of events and activities to spark your creative juices:

I Hereby Declare. . . Ask your mayor or city council to issue a proclamation declaring the last week in August “(Your City) Buy Local Food Week.” Attend the news conference or meeting where the proclamation is issued so that you can answer questions from reporters attending the event.

Draw or Write About Farming. Sponsor a poster or essay contest for junior high or high school students to raise awareness in the community. Ask for drawings or essays that illustrate food and farming in your community. Provide school faculty with local farming fact sheets and contest rules. Print the winning poster or essay in the newspaper with a local number or Web site address to obtain more information. Ask farmers to donate prizes, farm visits, hay rides, etc.

Take ‘Em Out to the Ballgame. Athletic events provide a great opportunity to distribute information about your organization, whether it’s a professional, college, high school or community sporting event. Set up a table at the entrance gate and pass out information. Ask the game announcer to mention your Buy Local program during halftime or timeouts. You can also ask sports organizations and facilities to put a

Buy Local food message in the program or on the scoreboard.

It's in the Bag. Ask local stores to place Buy Local information in shopping bags as customers check out. You can also design a flier and ask stores to display it by their cash registers or on their entrance and exit doors. And ask these merchants to include your message on their next print run of shopping bags.

Link Up. If you don't have a Web site, you can still get plenty of cyberspace mileage by networking with related organizations, agencies and companies. Ask groups and businesses to include a paragraph about your organization on their sites. Supply them with logos from your organization to include on their sites. If you do have Web presence, you can use the same networking techniques to increase traffic. Just ask those same organizations and companies to link to your site, and in return, you can offer to provide a link to them.

Hang Your Message High. Put banners in the lobbies of schools, grocery stores, libraries and other places. A simple message works best. Include your organization's phone number and Web site address so that people can request additional information.

Relate to the Community. Ask local civic organizations, business and religious groups if you can speak about your Buy Local program at one of their gatherings. Bring copies of your educational materials to distribute. Ask attendees to fill out a sign-up sheet to receive more information. Follow up with any local businesspeople in attendance about establishing a partnership with your organization.



DISCUSSION QUESTIONS: COMMUNICATIONS PLANNING

- What are your short- and long-term communications objectives?
- What is your timeline to launch and run the campaign?
- Who are your target audiences?
- What are the key communications messages?
- What are your staff and financial resources?
- What materials and activities will best disseminate your message?
- What media will you target?
- What specific roles have you identified for your spokespeople? What training will they need?
- What roles will participating farmers, retailers, partners, funders and staff play?
- How will you evaluate your communications work?





RESOURCES: COMMUNICATIONS

Some of the materials in this chapter were adapted from the following sources:

Making Health Communications Programs Work: A Planner's Guide, Office of Cancer Communications, National Cancer Institute, National Institutes of Health, 1992. Available online at <http://oc.nci.nih.gov/services/HCPW/HOME.HTM>.

Enough is Enough! The Hellraiser's Guide to Community Activism, Diane MacEachern, Avon Books, 1994.

This book is out of print. For information on purchasing a copy, contact Vanguard Communications, 2121 K Street NW, Suite 300, Washington, DC 20037; Phone: 202-331-4323; e-mail: vanguard@vancomm.com.

Other suggested references include:

Community Activism and Communications Tactics

Hands on Social Marketing: A Step-by-Step Guide, Nedra Kline Weinbrich, Sage Publications, 1999.

The Jossey-Bass Guide to Strategic Communications for Nonprofits, Kathy Bonk et al, Jossey-Bass, 1999.

To order publications from Jossey-Bass, call (877) 762-2974, fax (800) 597-3299, or visit www.josseybass.com.

Marketing Workbook Volume I: Develop The Plan, Second Edition, by Gary Stern with Web Wisdom by Elana Centor, Wilder Publishing Center.

To order publications from the Amherst A. Wilder Foundation Publishing Center, call (800) 274-6024.

Marketing Workbook Volume II: Mobilize People for Marketing Success, Gary Stern, Wilder Publishing Center,

FoodRoutes Network Communicators Toolkit

Publicity Campaigns

Guerilla PR, Michael Levine, Harper Collins, 1993.

Strategic Communications for Nonprofits, Benton Foundation and Center for Strategic Communications, 1992.

Media Directories

Media directories are available at most libraries. Your partners or other organizations that you frequently work with may also have copies. The most popular directories are Bacon's Media Directories, Gale's Directory of Publications, and News Media Yellow Book, all of which are national in scope. Call your local chamber of commerce or press club for information on media directories for your city or state.

Remember, whatever printed source you use, special sections and programs are likely to change, people in the media are likely to move around, and the information reported in the latest annual directory may, in fact, already be dated by the time it is published. To ensure accuracy, a phone call is the best source for up-to-the-minute information.

Attachments

Marketing Director Job Announcement



Marketing Director Job Announcement

CISA's Marketing Director will oversee a major organization program, a media and communications campaign supporting sustainable agriculture in western Massachusetts. Successful coordination of this venture will require considerable skills in on-the-ground community organizing, sophisticated communications planning, and knowledge of agricultural marketing and distribution issues. Areas of major focus will include both implementation of existing campaign programs and long-term strategic planning for the evolution of this initiative.

Duties and Responsibilities:

- ✓ Campaign planning and oversight in cooperation with CISA staff and board of directors and the FoodRoutes Network Advisory Council
- ✓ Partnership development: working with the executive director and board of directors to build and maintain a cooperative relationship with funders, community organizations, institutions, and individuals; the FoodRoutes Network planning committee; the national FoodRoutes Network team; and the W.K. Kellogg Foundation
- ✓ Media and public relations
- ✓ Supervision of program assistant, interns, and work-study students

Desired Qualifications:

- ✓ Commitment to CISA's mission of sustaining agriculture in western Massachusetts by strengthening the farmer/consumer connection
- ✓ Marketing, communications and public relations skills
- ✓ Successful track record of media, communications or advertising campaign development
- ✓ Experience with participatory, cooperative program planning and execution
- ✓ Experience with marketing for nonprofit groups or social marketing
- ✓ Knowledge of northeastern agriculture
- ✓ Excellent oral and written communications skills
- ✓ Strong interpersonal skills

Deadline: January 24, 2000, or until a satisfactory candidate is found.

CISA is an equal opportunity employer.

Chapter 9:

Communications Tools and Tactics

There are a million and one tools and tactics for communicating with your audiences. Some involve mass media channels while others are grassroots-based. Some are costly. Others can be done on a shoestring. Creativity is the name of the game. It's also worth keeping in mind that the cost of media buys, graphic designers, printing, and so on, vary widely from one locale to another. As a result, we'd encourage you to get to know your media market and explore a wide variety of approaches that might be a good fit for your campaign and your community.

WHAT TACTICS TO CONSIDER?

As Community Involved in Sustaining Agriculture (CISA) began thinking about how to communicate with our target audience, we drew heavily on our pre-campaign market research and the pointers it gave us about which communications channels held promise. The research told us, for instance, that newspapers were an important source of information for our audience. It also told us which particular papers they read the most. We also found that radio was an important channel, although the listenership was splintered among a wide variety of stations.

We knew, as well, that more personalized forms of community outreach were important. So events, tastings, in-store demonstrations and farm tours needed to be a key piece of the puzzle. And point-of-purchase materials at farmers markets, grocery stores and so on, were critical to enabling customers to identify what was locally grown once they got to the marketplace. CISA also wanted to garner as much "earned media" as possible (media coverage that we didn't have to pay for: stories, editorials, etc.). So right from the get-go, we used quite a range of communication tools.

We've since learned some important lessons about the challenges and benefits of each of these tools. Our post-season consumer tracking survey has also given us some very useful data about which techniques were most effective in building consumer awareness and how the various tools reinforce one another. (You'll find our 2001




tracking survey results in chapter 11.) We continue to hone the mix of tactics we use and to redirect our communications dollars to those tactics that seem to generate the greatest awareness.

To give you a flavor for how various tools are working for us, this chapter explores what CISA has tried to do and learned regarding specific communications and outreach channels. We hope this will give you some practical insights that you can apply to your own situation. On the following pages, you'll find summaries of our experience with:

- Newspaper ads
- Radio ads
- Point-of-purchase materials
- Posters
- Bus advertising signs
- Direct mail
- Promotional events
- Character suits (yes, that means people dressed as carrots and apples)
- Farm Products Guide
- Annual farm tour
- Web site

*... get to know your
media market and
explore a wide variety
of approaches that
might be a good fit
for your campaign
and your community.*



We persuaded a few of our retail partners to add our Local Hero logo to their own newspaper ads. This was a good way to stretch our ad dollars and provided some “feel good” publicity for the retailer.

- Swag (T-shirts and other items featuring our logo and slogan)

Examples of some of these materials are integrated throughout the text, while others can be found in the attachments.

NEWSPAPER ADS

What We Did:

In the first year of the campaign we purchased a significant number of ads in two regional daily papers. We ran about two ads per week, and each ad featured a picture of a farmer with a description of what they grew as well as information about our campaign. We chose an eye-catching and memorable design and a size that was affordable enough to run frequently. These ads were very successful at building consumer awareness and interest in buying locally grown and helping farmers get name and face recognition. “Putting a face on farming” was important to area consumers and this advertising strategy continues to work well for us.

What We Learned:

- Once you start having a visible presence in a few area papers, you may find that many other papers will start asking you to advertise with them. Some will try to shame or guilt you into buying ads; others will offer you some pretty tempting deals. You need to be skilled both at saying “no” and jumping on a good deal when one appears.
- We persuaded a few of our retail partners to add our Local Hero logo to their own newspaper ads. This was a good way to stretch our ad dollars and provided some “feel good” publicity for the retailer. But many retailers and farmers were hesitant to do so because their ad space was tight or they did not want to change their long-standing ad design.
- Beware of the free weekly community papers that run a lot of classified ads and announcements. They may boast of a large circulation and low advertising rates, but unless they have a reasonably good local news section it may not be worth the little money it costs to use them. We also ran into a problem with one such paper that refused to run a news story about our work until we bought ads from

them. Newspapers boast about a “firewall” between the editorial and advertising sections, but apparently that wall had burned down long ago at this paper.

- Make sure to ask for nonprofit ad rates when you approach newspapers, radio stations, etc. Many media organizations have reduced rates for nonprofits, but you have to ask for them.

RADIO ADS

What We Did:

CISA had radio ads professionally produced for our campaign. We had one 60-second spot in our first campaign year and then added a second in year two. They were designed to be humorous, catch consumers’ attention and “get under their skin.” We thought that humor would be essential. People are exposed to hundreds of ads a day and ads are more likely to stand out from the crowd if they feature an emotionally resonant or humorous theme.

We also had one of our farmers say a few words about his farm and say the tag line at the end of each spot to make that personal connection with consumers. While the body of the ad stayed the same, we had a variety of farmers talk about their farms. This added a spark to our standard ad and was a perk that delighted many of our farmers. The ads cost \$7,600 to produce and \$15,000 to air for one season. But they also got very high rates of consumer recognition. They aired several times a day on a handful of commercial stations each year, from June through September.

Ultimately, we got a few complaints from farmers and others close to the campaign that the ads were airing too frequently and were becoming annoying. Our media consultants assured us, however, that by the time people close to the campaign were sick and tired of the ads, the general public was just starting to notice them.

What We Learned:

- The cost of producing radio ads can be daunting. Explore your options for low-cost approaches. (See page 82 for information on public service announcements.)
- Explore locally produced alternatives, but make sure the production and writing quality are up to snuff.

- Watch out for media consultants who try to entice you into higher gloss media than you want to use (e.g., television). We were repeatedly encouraged by our radio ad producer to consider TV advertising despite our adamant lack of interest. Unless you have partnered with a TV station, think twice about producing television public service announcements (PSAs). The ads may get little airplay, and when they do, it is likely to be when your audience isn't awake.
- Take care to monitor the radio stations you work with to make sure your ads are actually being aired.
- Inspect bills from radio stations for cost discrepancies. Make sure to ask for nonprofit ad rates and verify that you are receiving them.

POINT-OF-PURCHASE MATERIALS

What We Did:

We created point-of-purchase (POP) materials for use in stores, restaurants and other businesses, and by our farmers at their stands, so that consumers could easily tell which foods are locally grown. Our POP materials include:

- Two sizes of “shelf talkers” (i.e., price cards with our logo in the corner)
- Two sizes of Local Hero stickers to put on egg boxes, milk cartons, etc.
- A green, state fair-style Local Hero satin ribbon
- Posters (discussed in more detail on page 83)
- A six-inch, round Local Hero logo with a wire stand for produce bins
- Local Hero bumper stickers and buttons

Thus far, we have provided POP materials to our retail and restaurant partners free of charge. They use a preprinted order form to request more materials when they run out.

What We Learned:

- POP materials may be considered the most important aspect of your campaign—how will the consumer know which foods are locally grown without them? Good design of appropriate materials that get used is central to a successful campaign.



CISA RADIO AD: LOCAL SQUEEZE (:60)

CLERK: Excuse me ma'am. Please don't squeeze the vegetables. I work here in the produce department. I can help you select the freshest ones.

CUSTOMER: You look too young to work in such a big supermarket. What are you, a junior clerk or something?

CLERK: I'm the *assistant* manager of produce.

CUSTOMER: *Assistant* manager? You're so young. Well, you must be very smart too. So tell me mister assistant manager, how can I tell if the vegetables are the freshest if I don't squeeze them?

CLERK: It's easy. If you want the freshest, all you have to do is look for this Local Hero label or sign.

CUSTOMER: The Local Hero?

CLERK: Yes, look over here. These tomatoes have the local hero sign. That means they were grown on a local farm right here in western Massachusetts. Those tomatoes over there came from all the way across the country.

CUSTOMER: So, when do I squeeze them?

CLERK: You don't have to squeeze anything. When you see the Local Hero sign, you know you're getting food that's farm fresh.

CUSTOMER: No squeezing? You sure mister assistant manager?

CLERK: Yes and there are also fresh Local Hero eggs, milk, poultry, meats, and maple syrup all grown or produced right here in western Mass—just look for the Local Hero signs or labels.

ANNOUNCER: For the freshest food in the store, look for the “Local Hero Western Mass Grown” labels or signs. A message from CISA, Community Involved in Sustaining Agriculture, on behalf of western Massachusetts farms.

CUSTOMER: You're pretty smart for such a young man. How 'bout I just give you a squeeze?

CLERK: Mom, I'm working!

CUSTOMER: And so handsome. . .

CLERK: MOM!

- We found that each grocery store, restaurant, etc. we work with has unique systems, requirements and aesthetic preferences. One set of materials definitely doesn't fit all. So before you invest in a lot of materials, work to understand your partners' needs and past experiences with POP materials. Then design materials they are most likely to use.



CREATING PUBLIC SERVICE ANNOUNCEMENTS

If you are looking for less expensive ways to get your message out through formal media channels, consider public service announcements (PSAs). PSAs are created for use like advertisements, except that they are “placed” without cost. Publications, radio stations and television networks usually run PSAs on a “space-available” basis when they have unsold advertising or commercial space. Here are some ideas to get you started on developing a PSA:

Brainstorm a List of Possibilities

PSAs can be used in a variety of circumstances. They can be created on video cassettes and CDs, printed on grocery bags, posted on neighborhood bulletin boards, in theater playbills, and movie theater slide shows just to name a few. Radio PSAs can be written as “live announcer copy” to be read by on-air personalities. Print PSAs might even run as bookmark-sized versions of the complete PSAs.

Also think about the organizations that could make your PSA visible. Begin by identifying groups with whom you often interact, businesses you support, groups who might share your values, etc. Each is likely to have a newsletter or bulletin board where your PSA could be posted. They might include:

- Libraries, schools, city hall, other public buildings
- Community, neighborhood and tenant associations
- Parent Teacher Associations (PTAs)
- Houses of worship
- Shopping malls
- Youth centers, health clubs, arts centers, other recreational centers
- Neighborhood pharmacy or grocery store

Also look for low-cost ways to get your PSAs produced. For instance, a printing company might run a PSA on leftover scrap paper, print their company name on the back side, and donate the bookmarks for distribution at community events—a winning idea for all concerned.

If you have not already compiled a local media list, do so. You may be able to borrow lists already created by other organizations. Or go to your local library and use one or more of the media directories available in the reference section. (See page 76 for suggestions.)

Think, too, about who the best contact person will be at each of these media organizations. In print media, the advertising director usually handles public service space. For television and radio, contact the public service director.

Getting Your PSA Placed

Your best bet for success is to visit those organizations that might feature your PSA. Remember, you are building a relationship for the future as well as placing advertisements. If it is not possible to make personal calls, send the PSAs with a cover letter to the contact person emphasizing why your PSA messages are important to their audience. Share evaluation data about your work and explain the social and financial benefits to the community. Invite these organizations to be part of your campaign.

And if you have volunteers at hand, involve them in getting making your PSA out into the community.

Follow Up

Lastly, good follow-up is essential. Consider some of these approaches:

- **Phone or Mail.** Once you’ve made initial contact, follow up by telephone or mail to reiterate the importance of running your PSA. Determine the particular media outlet’s level of interest in your PSA.
- **Keep a Record of Response.** Record the responses to each pitch you make. Keep newspaper, television and radio clippings for your “brag book.” Track the public’s response when the PSAs run.
- **Acknowledge Positive Responses.** Send a thank-you letter to your contact when the PSA is run or posted. For those media outlets that have been especially generous, you might want to issue a certificate of appreciation or give special recognition at a local campaign event.

- Really explore the specifics. For instance, we have two sizes of stickers but only the smaller one gets used regularly. It turns out that the larger size obscures too much of most farmers' labels.
- While it is easy to drop off POP materials at the store and think that your job is done, regular monitoring is essential to ensure that the materials get used, and get used correctly. CISA hired a part-time "spotter" to visit stores during the height of the campaign for just this purpose.
- Most retailers do their best with POP materials, but we've also seen Local Hero signs posted above avocados (obviously something in that bin was local at some point). We've seen them promoting *locally manufactured* food products (e.g., salsa) containing no local ingredients. We've seen them languishing in the back room waiting for someone who is motivated and knows how to use them. Regular spotting is essential, especially if a store's staff turnover is high.
- If your campaign is going to work with a lot of retailers, take special care to ensure that the stores' employees understand the campaign's goals and the commitment that the store is making by participating—from top management to produce managers and right on down to the shelf stockers. These people are busy and they move a lot of product. A weak link in the chain can result in POP materials that are in the wrong place at the wrong time. Consider providing training to store staff about what the label means and how to use your POP materials appropriately. If they don't understand your campaign, they can't answer consumers' questions. You need their understanding and their involvement.
- And lastly, here's a tip from one of our consultants: don't put a sticker on every jar or melon. Put stickers on every fifth one or so. That way the sticker stands out in the store rather than creating a uniform background. Consumers will notice them more this way.

POSTERS

What We Did:

CISA printed a full-color poster designed for grocery store produce sections that read "We sell locally grown products" and featured pictures of farmers holding products, and our

logo. The posters came in two sizes, 11" x 17" and 21" x 30" and were intended to inform customers of the store's support for local farmers. The bold, colorful posters got a good level of recognition among area consumers.

What We Learned:

- It's important to check with area stores before designing these materials. Ask about the spaces where they might display your posters and find out what size would work best for them. This will increase the likelihood that your posters get used.
- Some stores may lack the equipment to display posters prominently. (For instance, posters requiring an easel that takes up valuable floor space may not be a good idea. Posters that hang from wires above produce bins might be a better choice.) Again, ask your retailers what would work best for them.
- We've found that store staff may not follow through on promises to post these materials. Be sure to follow up—in person—with every store that agrees to display your poster.
- We printed some posters featuring a farmer who subsequently left the campaign. Those posters became obsolete—a costly error. That experience has made us a bit more cautious about featuring farmers whose commitment to the campaign isn't solid.



If your campaign is going to work with a lot of retailers, take special care to ensure that the stores' employees understand the campaign's goals and the commitment that the store is making by participating.

BUS ADVERTISING SIGNS

What We Did:

CISA had large, colorful signs placed on the sides of buses. We have a public bus system in some of our more populated areas, so this seemed like a good way to reach pedestrians, bus riders, car drivers and other consumers. The signs featured farmers and our logo and slogan, as well as the logos of our sponsors. Our public relations consultant purchased every *single bus sign spot* available in our area during the first year of the campaign (and that's a lot of buses).



Make sure that the images you use are appropriate for your locale and your farmers.

What We Learned:

- Make sure that the images you use are appropriate for your locale and your farmers. Our bus signs featured a white egg, which really bothered one of our local brown egg producers. The egg producer told us of a marketing campaign years ago that used the tag line, “Brown eggs are local eggs and local eggs are fresh.” What an embarrassing mistake!
- Purchasing so much ad space was unnecessarily expensive. It turns out that our bus company has a policy of running nonprofit advertising for free to keep spaces on their buses filled. In fact, even though we bought the ad space for a specific length of time (which has long since ended), we still see a few of our signs cruising by.
- Our consumer tracking survey found that bus signs were not the most effective advertising vehicle. We’ve since stopped paying for bus ads.

DIRECT MAIL

What We Did:

We mailed out a glossy, four-page direct mail advertising piece prior to launching the campaign. The idea was that a direct mail piece would “soften” the market and make people more receptive to subsequent campaign advertisements. The piece featured a photo of a farmer’s grandchildren in his strawberry field, and included information on why buying locally grown was important to our community.

What We Learned:

- The tracking survey showed that this piece was not effective. We don’t know if this

was due to the mailing itself or problems with its distribution. More than 60,000 pieces (costing \$9,000 to produce and mail) were reportedly sent to every household in a two-county area. However, no one on CISA’s staff received one in the mail. This direct mail piece had one of the lowest awareness rates in the post-season tracking survey conducted by our market researcher.

PROMOTIONAL EVENTS

What We Did:

Our pre-campaign research indicated that people in our community want to connect a face to the farm product and know the people who grow their food. In the first year of the campaign, we coordinated a very busy schedule of in-store tastings, tables at fairs and festivals, and other promotional appearances. At each event we made sure to have our farmers there offering samples, whether it was milk, garlic, alfalfa sprouts, cheese or melon. The more events we did, the more calls we got from other organizations asking us to bring farmers to their events.

What we learned:

- Promotional events can be very important for farmers on several levels. Some of our farmers reported that sales of their products increased during tastings. Clearly, some shoppers liked what they tasted and bought more to take home. In some cases, it also strengthened relationships between our farmers and the retailers that hosted the events. Some farmers, especially our milk producers, also reported that they had



a lot of comments from people telling them they love their milk, that they already drink it, and that they are glad to meet the farmers in person. That morale boost can be really important to farmers. And it's a good opportunity for farmers to check out how people react to their products.

- CISA wanted to have staff at every event so that we could promote our message and answer any questions. As more appearances were requested, more demands were made on staff time. We had to really scale back during the second and third years of our campaign. We simply didn't have the staff time to attend every fair, festival or store all season long. We now focus on a smaller number of events and tastings that we think can maximize our impact.
- Our market research showed that this kind of activity ranked low in recognition after the first year, perhaps because a relatively small number of people were reached. But we find that this kind of community engagement—the very positive, personal interactions between farmers, staff and the public—makes events important to do, albeit on a more manageable scale.

CHARACTER SUITS

What We Did:

A local costume designer created two adult-sized costumes for our campaign: a carrot and an apple. The carrot and apple attended events and festivals to add fun, hand out information and engage crowds of people.

What We Learned:

- The costumes get attention. Kids love them.
- We made a point of handing out Local Hero stickers to kids at fairs and used that interaction with kids to engage their parents. Kids love the stickers.
- Some of our staff refused to wear the costumes while others reveled in their debut as the giant carrot. After the first two seasons, we hired two actors to wear the suits and attend farmers markets, fairs, and other events. This arrangement worked well; the suits got out there and staff did not have to wear them.
- The tracking survey showed that the character suits had a low level of

recognition. Compared to the radio and newspaper ads, the suits didn't reach a large number of people, but the personal interactions can be fun and they certainly do draw attention. We'd classify this activity as a low priority.

FARM PRODUCTS GUIDE

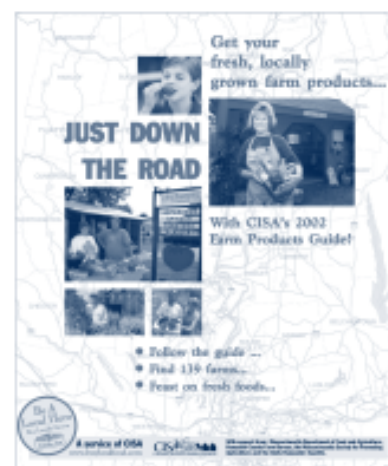
What We Did:

CISA had published a guide to local farmstands in the two years before our campaign started. With the advent of the campaign, we decided to expand the geographic coverage of the guide and recruit more farmers. The guide has grown from 32 farms in two counties to 139 farms in three counties in just three years. The guide is distributed to 80,000 local newspaper readers in late April, and includes area farmers markets, community supported agriculture farms, a map locating the farms, and descriptions of each farm and the products sold. It is a year-round guide to purchasing directly from local farmers. The guide is also distributed to area tourist information centers and Chambers of Commerce. For several years we were able to get a local printing company to donate the printing; recently we have had to take on that cost ourselves and figure out ways to make the guide self-funding through listing and ad fees.

What We Learned:

- We see the guide as a good intermediate step in our recruitment of farmers: they can join CISA and get into the guide without committing to the Local Hero campaign, or they can do both. Some farmers who are reluctant to join the Local Hero campaign will join CISA to be included in the guide.
- The guide has made a tangible difference for many farmers, some of whom report that consumers arrive at their stands with guides in hand, and purchase enough products to pay for several more years' listing in the guide.
- Production of the guide is a major undertaking for CISA. In 2002, we'll issue 200,000 copies for about \$20,000. This is funded through memberships, ads and sponsorships. We start recruiting farmers

... We find that this kind of community engagement—the very positive, personal interactions between farmers, staff and the public—makes events important to do ...





*If you make shirts,
staff should wear
them at as many
public events as
possible to help
promote the program.*

in December, with a cutoff in mid-February to allow at least a month for production, and another two to three weeks for review, printing and distribution.

- The map section alone takes several days to prepare. We may eliminate it in the future to create more space for farms, ads and sponsors.

ANNUAL FARM TOUR

What We Did:

In the third year of our campaign we created a special fundraising and promotional event called the “Fall Farm Tour and Feast.” The tour featured a self-guided visit to six of our member farms and a locally grown luncheon created by area restaurants. Each farm offered activities, demonstrations, tours and/or hayrides.

What We Learned:

- We sold more than 100 tickets at \$30 each and garnered some good local sponsorship. The event was a great success and a good first step toward creating an annual event with significant fundraising potential. We want to do it again next year and tweak it to maximize the fundraising potential.
- This type of event can be great for recruiting farmers and/or rewarding partners and volunteers.
- It can also provide you with a media opportunity for those slow news weekends.

WEB SITE

What We Did:

A month or so before CISA’s campaign launch, we had no plans or funds to create a Web site. But one of our staff members leapt into the fray, taught himself a bit about Web design, and had a basic site ready by the kickoff. The site, www.buylocalfood.com, provides information on the campaign and the farmers, retailers, and restaurants that are part of it. It also gives users online access to the Farm Products Guide and serves as a venue to promote CISA events like our farm tour and annual meeting.

What We Learned:

- We’ve found our Web site to be a useful

tool, albeit a time-consuming one to design and maintain. For us, it is best used for quick updates that are easy to post.

- We had ambitions of creating a really in-depth site with lots of background information. Alas, we were deterred by the time needed to design it.
- We also learned that a computer-savvy staff person can save a lot of money by creating a site in-house. Web site developers can be expensive and finding one who fits your organization’s culture may be a challenge. If someone on your staff or among your membership is interested, is skilled and can spare some time, developing your Web site in-house might be worth consideration.



SWAG

What We Did:

Early in the campaign, we developed a bounty of swag—a stunning array of T-shirts, tote bags, bumper stickers, hats and aprons shamelessly bearing our logo and slogan. We spent about \$3,000 to create these materials. And we’ve carried our stuff all over the place, from upstate New York to Boston, from county fairs to garlic festivals. We usually sell a shirt or two, but demand is never all that high.

What We Learned:

- The swag is useful to have on hand, especially if a newspaper photographer or TV news crew is doing a story about one of your farmers and you can get the farmer to wear your T-shirt or hat.
- If you make shirts, staff should wear them at as many public events as possible to help promote the program. Staff should also wear the shirts any time they are going to be interviewed on camera or photographed.
- You might start by ordering smaller quantities or having a smaller variety of items. Don’t expect to sell a lot in one season, but do have it around to give to VIPs, extra-special donors, sponsors or friends of your organization.

Chapter 10: Local Food in the Marketplace:

WORKING WITH RETAILERS, FARMERS MARKETS, FARM STANDS, INSTITUTIONAL BUYERS AND DISTRIBUTORS

Community Involved in Sustaining Agriculture's (CISA) market research indicated that local consumers wanted to purchase more locally grown farm products but were confused about where to find them and believed them to be inconvenient to purchase. These findings made it clear that we had to find and identify locally grown products

Our approach to the retail market evolved and expanded over time. We began by focusing our efforts on small and large grocery stores, and gradually expanded to include farmers markets, restaurants, farmstands and, most recently, institutional food buyers. Currently, we work with:

- Three large, national grocery chains
- Fifteen smaller, family and/or local owned grocery stores
- Twelve restaurants
- Eight farmers markets
- One hundred twenty-seven farmstands (through our annual Farm Products Guide)

In this chapter we discuss:

- CISA's approach to working these different businesses
- Some of the challenges and benefits we experienced
- Tips to help you succeed as you help bring local food to the marketplace

RETAILERS LARGE AND SMALL

Despite the large number of farmstands and farmers markets throughout our region, our research confirmed that the vast majority of consumers get most of their food at one of the area's many large and small grocery stores. In order to reach a large number of consumers, we needed to develop a strong presence where they do most of their shopping throughout the year.

From the beginning, CISA has worked with both small, locally and/or family owned grocery stores and large supermarket chains. For us, it wasn't a question of either larger stores or smaller ones, but a matter



of both large and small. Both are important to our farmers and to us.

Locally Owned Grocery Stores

Our community is fortunate to have a number of smaller, independent grocery stores. Many have a long-running commitment to local produce and focus on shoppers who have an interest in healthy, local food. We had good relationships with several of these stores before our campaign began. They helped us design the Buy Local effort and were among our greatest supporters.

We also felt that these stores were essential for philosophical reasons: they are local, they are invested in the community, and they value their relationships with local farmers. They tend to be more willing to experiment, accept backdoor deliveries, share their sales data with us, and help us improve the program.

Large Supermarket Chains

Large supermarket chains also have been central to CISA's campaign. They are able to move much more product and reach many more consumers than small grocery stores. Given the intended scale of our campaign, it was essential that we have sufficient presence in the marketplace. Some of our farmers also needed retail outlets that could accommodate larger quantities.

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RETAIL PARTNER HITS THE AIRWAVES



One of CISA's retail partners, Serio's Market, highlights their selection of locally grown food in one of their radio ads. The ad refers to CISA and two farms that are part of the Local Hero campaign, and is a wonderful complement to CISA's own radio ads. The ad script goes like this:

Local. There are few words you can say in the Pioneer Valley that have more meaning, more resonance. People in these parts just love things that are local. That's what CISA is all about. And that's why Serio's Market is so popular. Serio's is a truly local market, run by local folks, and stocked with local products wherever possible. A new local item at Serio's are delicious, homemade Bird Haven Blueberry Farm pies. They are all made from scratch and they are unbelievably good. Locally grown apples are coming in now, as are other fall treats, like Diemand farm chicken and turkeys, like squash, pumpkins and cabbages. If you love local, then you'll love Serio's Market, State Street, Northampton...where customers are friends and friends are customers.

*Having the products
of Local Hero
growers clearly
labeled as such has
also been important
to us and prospective
retail partners.*

Grocery stores and chains may be important customers for some of your farmers. While some farmers may want to (or need to) work through smaller or less formal channels, the benefits of working with large retailers can be substantial if you can make those relationships work well.

CISA had worked with the local Bread and Circus, part of the national Whole Foods chain, before our campaign began. Bread and Circus prides themselves on their produce selection. While they often favor California-grown organic produce, they also have a strong commitment to local organic and integrated pest management growers. We found that this commitment has grown stronger and more reliable over time. Bread and Circus is also a very important buyer for some local farmers. We found that they are enthusiastic supporters and are more willing than other large chains to accept farmers' backdoor deliveries.

Other area supermarket chains proved to be more challenging for us. For instance, while the locally owned Big Y chain and the regional Stop & Shop chain were interested in participating in our Buy Local program, their internal structures made it difficult to do so initially. Both use central warehouses to distribute products to their stores and generally do not allow backdoor deliveries of produce. This meant that a Local Hero farmer could sell a few pallets of butternut

squash to the chain, but they would go to a central warehouse, get mixed in with squash from other regions or states, and redistributed to multiple stores.

However, during the first year of the campaign, our persistent wooing of upper-level management and local store managers convinced Stop & Shop to allow two local stores to officially accept backdoor deliveries from campaign members on a trial basis.

Having the products of Local Hero growers clearly labeled as such has also been important to us and prospective retail partners. For instance, we were fortunate to have our local dairy farmer co-op, Our Family Farms Milk, as an active member of our campaign from the start. Their distinctly labeled milk gave us a foot in the door at some stores.

Our retailers currently pay \$150 per year to participate in our campaign. In exchange, they receive the following benefits:

- High visibility in Local Hero newspaper advertising program through group ads listing retail members.
- Free photography services for Local Hero ads and permission to access Local Hero photos free of charge.
- A listing in the Local Hero section of CISA's Web site (www.buylocalfood.com) with a link to their Web site, if applicable.

- An unlimited supply of available Local Hero point-of-purchase (POP) materials—price cards, logo stickers, etc.
- An unlimited supply of available Local Hero promotional materials—bumper stickers and posters.
- Results from our year-end consumer surveys to use in their promotional materials.
- Referrals to reporters seeking retailers promoting locally grown farm products. This results in media coverage for the retailer and CISA.
- Priority referrals by CISA staff to farmers looking to supply area businesses with locally grown farm products.
- Priority opportunities to be featured at CISA events.
- In-store tastings, coordinated and attended by CISA staff.
- Frequent listing in CISA's Local Hero handouts to the media, general public, funders and others interested in learning about the campaign.

The Challenges of Working With Retailers

Retailers of all sizes present a complex array of challenges to any Buy Local campaign. Their margins are tight, staff turnover can be high, and internal bureaucracy can tangle up even the most persistent and enthusiastic local produce manager. We've encountered plenty of challenges in our work with retailers. Here are some that we thought you should know about:

Segregation of product. The bigger the retailer, the harder it may be for the store to keep Buy Local products separate from everything else. You can't supply everything that big stores need, so local product tends to get mixed with non-local ones.

Backdoor deliveries. Most of our big retailers refused backdoor deliveries—at least officially—and only accepted produce that came through a central distributor. This made it difficult to get local products into their stores. Small grocery stores have consistently been more willing to accept backdoor deliveries, and we have negotiated backdoor delivery systems with several of our larger

grocery partners. Linking up with a local distributor has also helped.

Product availability. While CISA doesn't want to function as a broker, it was critical—especially early on—that our farmers had a sufficient presence in the marketplace once consumers started responding to the campaign. We work with store managers to educate them about what is available when, and who they can purchase it from. We also respond to retailers' questions about local products and help them network with our growers through meetings, phone calls and e-mail messages.

Use of POP materials and training store staff. Having the staff time to “spot” the use of POP materials by your retail partners is essential to the success and integrity of your work. You may need to train partners' staffs so they understand your Buy Local program and make an effort to use your POP materials correctly. We learned the hard way that handing our POP materials to produce managers and expecting them to explain it to floor staff is not very effective. This was a particular challenge with large retailers that have large staffs and, often, more staff turnover than smaller stores.

Written agreements. Be sure to craft policies that make the terms of participation explicit and easy for you monitor. Have a written agreement with each retail partner in place from the beginning. You'll find a sample of CISA's in the attachments at the end of this chapter.

Risks and rewards. Grocers' profit margins are notoriously tight—often one to two percent—and they may not have much room to experiment or wait for results. Be prepared to explain why they should take a risk on your program. Be realistic about the results retailers can expect.

Varying attitudes and priorities. When working with a larger chain, expect that staff at different layers in the chain's hierarchy may have different attitudes and priorities. Senior managers, in particular, may view increased sales as the one and only measure of success. Produce managers and staff that have more contact with consumers may have a broader perspective. Some produce managers may be very keen on new approaches, while others may be very conservative or risk averse. Produce

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managers are on the front lines with local consumers and can make or break your retail program. Try to work with managers that will advocate for your program internally and work to make it a success.

Time constraints. Expect large retailers, especially, to be swamped and unable to set aside significant blocks of time for meetings and trainings. It's important to build and maintain your retailer relationships and to do so within retailers' time constraints. Try asking for brief meetings of 20 to 30 minutes. Have a clear agenda. Use the time efficiently. And don't even *think* about trying to get their time between Thanksgiving and New Years!

Getting sales and price data. As part of our campaign evaluation, we try to track retail sales and assess whether products from Buy Local farmers are commanding a price premium (i.e., if products from our farmers are receiving a higher price than similar non-local products). This continues to be a big challenge. Our retailers typically don't have a tracking system that can easily distinguish

Buy Local products from other foods. We've found that smaller retailers are sometimes more willing and able to provide good data than larger stores. We typically need to do a lot of cajoling and hand-holding to get good information from our retail partners.

There's no doubt that overcoming some of these challenges can be difficult. But remember that retailers are very responsive to consumer demand. If they see consumers respond, they may become more interested in joining your campaign and doing what is needed to get local products on the shelves. Grocery stores looking for a way to distinguish themselves from their competitors may be a good place for you to start.

Our advice about working with retailers is to be organized, make good use of your time with them, work to understand their circumstances, and be prepared to answer some tough questions. If you can show retailers how they may benefit from working with you and you minimize the hurdles to doing so, retailers will be more willing to play a critical role in getting your farmers'

Our advice about working with retailers is to be organized, make good use of your time with them, work to understand their circumstances, and be prepared to answer some tough questions.



SERIO'S MARKET

When CISA began identifying potential retail partners, Serio's Market quickly rose to the top of our list; they have a great reputation among local farmers and a strong commitment to buying locally. A locally owned neighborhood grocery, Serio's features a deli, bakery, and full-service grocery in a bustling neighborhood of Northampton, Mass., next to Smith College.

"The Local Hero campaign was a natural fit for us," said owner Chris Cavallari. "We had been purchasing local all along, but the campaign helped bring our customers' attention to it and gave them a better sense of what products are local. The Local Hero signage really stands out. And it's been especially helpful late in the season when people don't realize that various local, year-round products are still available."

"A lot of our customers really like being part of something like this," Chris said. "It's kind of cool for them to think they are helping keep farms going. Some people tell me they feel really good about doing this and that the campaign signs help keep them focused."

CISA has also found that smaller retailers appreciate the work we are doing on their behalf. "Farmers and retailers alike are struggling to increase their bottom line," Chris said. "Anything that can help us stay healthy financially is a real blessing. I tell other grocers, 'If you want to sell as much product as possible and a Buy Local campaign is out there that can help you do that, join it!' Participating in a campaign may be a stretch for some small grocers, but the rewards are easy to see: customer appreciation, increases in sales and good farmer relationships. We're glad to have someone like CISA help us with our business."



products to market and getting your message in front of consumers.



LA CAZUELA

RESTAURANTS

As interest in healthy food continues to explode, interest in quality dining is rising in CISA's community as well. More and more cooking magazines, television shows and restaurants emphasize fresh, local ingredients.

Restaurants can become important members of your campaign, but they probably vary widely in their use of local food. Staff and ownership turnover in the restaurant world is extremely high, and you may find, as we have, that this year's stellar campaign partner may be long gone when next summer rolls around.

We found that many restaurateurs in our area view the time required to find and purchase local food as prohibitive. Many restaurants are accustomed to using one produce purveyor for all of their orders. Each new farmer will add another contact and bill to manage, as well as a different delivery time. We found that our success in recruiting restaurants hinges on engaging those restaurants that already work with local farmers and then encouraging them to educate other restaurateurs.

Two years into CISA's restaurant program, our participants vary widely. One restaurant opened with the expressed intention of using as much fresh, local produce as possible. Others use only a few seasonal fruits in desserts like blueberry cobbler or peach pie. However, all restaurants that use locally grown products are eligible to join CISA's campaign. We do not currently have a minimum quantity of local product they must use. There is a wide range of restaurants in our community and we believe it is important to work with all that express interest in using locally grown food.

In exchange for their membership, currently \$150 per year, restaurants receive benefits similar to those of retailers described on page 88. We also prepare a "Fresh List" of available farm products that CISA faxes to restaurants on a weekly basis. While the Fresh List is useful for both farmers and restaurants, we find that preparing it takes considerable staff time. Farmers are hard to reach at harvest time and it requires a

Barry Steeves is co-owner of La Cazuela, a restaurant that celebrates the cuisine of the American southwest. He founded La Cazuela 18 years ago with his wife and chef, Rosemary Schmidt. Barry said that working with the Local Hero campaign is, "worth it, absolutely worth it. Local produce gives us a better product to sell to our customers, and makes us more a part of the community in which we run our business. One of the farms we buy from has its year-end party at our restaurant every year and we see other farmers for dinner all season long. Those connections are really important to us."

CISA has found that many restaurants will use one or two Local Hero POP materials, but don't want to dramatically alter their restaurants' aesthetics. But Barry is different. He has used Local Hero POP materials in almost every way possible: our logo is in a display by the door, on the "specials" board, on table tents, in nooks and crannies in the dining room, on his menu, and in his newspaper advertising. "What seems to work best with any marketing is for people to be exposed to it in different kinds of media," said Barry. "It's better for me and for the organization to use Buy Local materials in many different ways."

Barry said his customers notice his participation in the campaign. "It's all so positive. Some people are happy to see that we buy locally grown. Others remark on how good a certain local ingredient tastes. That gives me an educational opportunity to talk about the freshness, flavor and quality of locally grown." While Barry clearly enjoys these connections, he is also clear about this: "I do this for my own marketing as much as I do it for farmers or CISA."



Dine on Locally Grown

These area restaurants proudly use locally grown farm products in their menu items:

Amber Waves - Amherst
Bart's Cafe - Northampton
Chandler's Tavern - South Deerfield
Deerfield Inn - Deerfield
Del Raye Bar and Grill - Northampton
Eastside Grill - Northampton
Green Street Cafe - Northampton
La Cazuela - Northampton
The Lord Jeffery Inn - Amherst
Maplewood Restaurant - Amherst
Paul and Elizabeth's - Northampton
The People's Pint - Greenfield


Community Involved in Sustaining Agriculture
www.buylocalfood.com
toll free 877-MAFOOD3



TIPS FOR ENGAGING RESTAURANTS

- Convey the benefits of buying locally grown products by sharing your market research data with potential restaurant partners.
- Discuss the benefits of being associated with your campaign.
- Leverage the fact that restaurants, like farmers, are often too busy to think about their own marketing. Provide helpful POP and public relations coverage. Make sure to ask your restaurant partners what sorts of POP they would be most likely to use and why.
- Establish clear criteria for restaurant participation and communicate your policies early on. Ensure that restaurants understand what it means to join your program.
- Build connections between restaurants and farmers by faxing or emailing information about the availability of locally grown products, along with farmers' names and contact information.

To launch the restaurant campaign, we held a lunchtime news conference featuring food prepared by our restaurant members and invited the media, our VIPs and politicians to enjoy a "taste of summer."

lot of phone calls to get the information for the list. To be most effective, that info needs to be compiled and distributed quickly.

Where restaurants and CISA connect best is at our events, forums and festivals. Many restaurants are more than willing to either donate a dish they made with local ingredients or come to an event and help cook and serve on site. This really is the best of both worlds—CISA and event participants get great local food, expertly prepared, and the restaurants get a direct connection with local consumers, many of whom are eager to patronize restaurants that serve locally grown food.

One of the ways we have shone the spotlight on local restaurants is through our restaurant campaign kickoff. To launch the restaurant campaign, we held a lunchtime news conference featuring food prepared by our restaurant members and invited the media, our VIPs and politicians to enjoy a "taste of summer." The resulting publicity was good for us, good for our farmers and good for the restaurants.

FARMERS MARKETS

We found that farmers markets are a great way to make that personal connection between farmers and consumers because:

- They are a terrific venue for emphasizing the community-based aspects of our campaign
- They have a long history in our region and are places where consumers already go to look for local products
- Promotional materials can be integrated into existing markets fairly easily.
- Including them in the campaign heightens consumers' sense that they are seeing our logo and message repeatedly and in many locations throughout our region

However, there are some important policy questions you'll need to resolve before engaging farmers markets in your campaign. For instance, does every vendor in the market need to join your Buy Local program before the entire market can join? What happens if one of the vendors at the market comes from an area outside of your definition of local?

In CISA's case, we opted to have each farmers market join the campaign as a whole rather than each individual farmer in the market. We promote the markets as a place to buy locally grown products rather than promote all of the individual farmers. Our farmers markets do not sell items grown outside of the area we consider local, so there are no issues about local vs. non-local products.

We provide each farmers market (and farmstand) participant a limited amount of POP materials to promote themselves as a local food source. Farmers markets also receive a Buy Local banner and radio and newspaper ads highlighting their market. We also hold tastings and other community events at area farmers markets, and have our apple and carrot characters hand out campaign literature. While time-consuming for staff, this is a great way to engage consumers and build loyalty to local products. We also found that working with farmers markets can be a good way to recruit new farmers for our campaign.

In our region, several markets experience a huge rush of customers in the early spring, when vegetable and flower plant sales are high. As residents' gardens begin to bear fruit, the markets lose steam. Our hope is to draw people to the markets throughout the summer, as well as boost attendance at markets with low customer bases in general.

Our local farmers markets are very



MAKING RESTAURANTS CENTRAL TO YOUR CAMPAIGN: THE BERKSHIRE GROWN STORY

Berkshire Grown is a program with deep roots in Berkshire County, Mass. The Berkshires is an area known for beautiful farm and mountain landscapes and international cultural amenities that attract a large number of tourists and part-time residents from the metropolitan New York area and beyond. Berkshire County farms face immense development pressure as wealthy individuals purchase farms as second homes. Part-time residents own over half of the housing stock in the county.

The robust tourism economy in the Berkshires has led to the development of a significant number of inns and upscale restaurants.

Founded in 1985, Berkshire Grown is a grassroots organization that supports and promotes locally based agriculture as a vital part of a healthy Berkshire economy and landscape. They have a budget about one-third of CISA's. Berkshire Grown pursues its mission by creating and expanding markets for locally grown products, establishing local food and farm networks, increasing public awareness through education and outreach, and encouraging supportive agricultural programs and public policies. Berkshire Grown has one part-time staff person and a dedicated crew of board members and volunteers. They have started to actively promote and market locally grown and produced food and flowers in the last four years.

"Working with restaurants seems a natural fit for our area," said Amy Cotler, director. "Both the restaurants and farms have peak seasons during the same months."

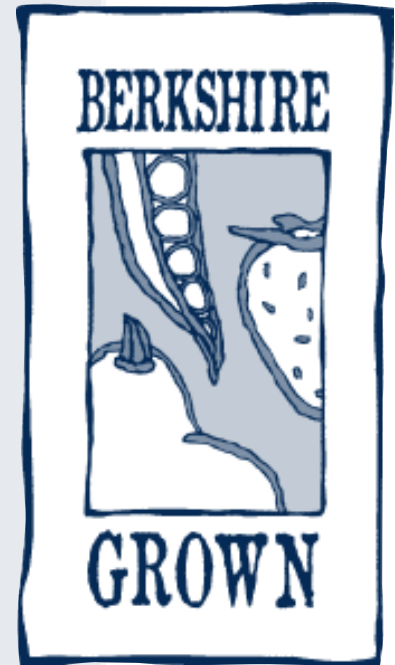
Several Berkshire County farmers are seizing the opportunity to develop working relationships with white tablecloth restaurants, collaboratively planning planting schedules and delivery systems to get more local food on the tables of these restaurants.

"This was a good beginning," said Amy. "Food system work is complex, but consumers can certainly wrap their minds around this simple concept: you can eat out at a Berkshire Grown restaurant, enjoy a great meal, and support local farms and the land they protect too!"

In three years Berkshire Grown's restaurant membership has increased from 26 to 90 restaurants. "Some simply buy a few locally produced items and others are quite actively involved, but overall, buying of local farm products from Berkshire Grown member restaurants has gone up about 50 percent. Restaurants feel the pressure from the community to buy local. . .that's good," said Amy.

Berkshire Grown's Business to Business restaurant program includes a "fresh" fax/e-mail listing of available products, an annual networking meeting, some one-on-one meetings with big buyers, a newsletter and periodic mailings when needed. Restaurants are given inserts that they can give patrons with their bills to let them know about Berkshire Grown and how they can all work together to support local farms. An annual harvest event, with 20 restaurants and about 30 farms, serves as a fundraiser. Berkshire Grown raises about one-third of their annual funds from this kind of community support.

Restaurants and farms in the program are also supported through a Web site, limited advertising, news releases and media coverage, when appropriate. The Business to Business program is guided by a steering committee of restaurants and farms, who meet and determine items such as what the agenda will be at the annual meetings, whether professional farmer/restaurant tours are helpful, etc. These folks, along with an active board, have taken a leadership role in the organization.



In three years

*Berkshire Grown's
restaurant*

membership has

increased from 26 to

90 restaurants.



appreciative of our efforts to help with promotions. One of the farmers markets asked us if we would help them with a raffle. We agreed and purchased the prize baskets, which are filled with local products from the market vendors. The market found additional sponsors and had coupons printed in the local paper. The patrons brought the coupons to the market and a drawing was held to choose a weekly winner.

This sort of low-budget marketing went a long way toward increasing the number of customers the markets see on an average market day. We were happy to help, given the high return for a small monetary investment. We anticipate increasing our participation with farmers markets in the future and look forward to helping them increase their exposure and income.

FARMSTANDS

Farmstands are very prevalent throughout our region. Our annual Farm Products Guide, published since 1997, has grown from a handful of farmstands in a few towns to 127 in three counties. This publication is our first big outreach effort each spring. We start signing up farmers in January, and the guide is published and distributed in three major newspapers (200,000 readers) in time for

the farmers markets' opening days in May. Farms that are listed in the printed guide also receive a listing in the online version, with a link to their Web site, if applicable.

The guide has become a good recruiting tool for the campaign. It costs farmers \$65 to be listed in the guide, and only \$35 more to enroll in the campaign. Around here, local farmstands are owner-operated by the growers or their employees. As such, they are treated as an extension of the Local Hero farm and receive the same benefits as farmers participating in the campaign—POP materials, signage, photography services, ads, etc.

While some of our participating farmers do not run farmstands, a significant number do. And they want to use the Local Hero campaign to drive more customers to their stands. CISA tailors our newspaper ads to highlight whatever aspect of the business the farm wants—whether it is a roadside stand, a pick-your-own operation or products distributed through local retailers. Several of our farmers attribute large increases in sales at their stands to membership in the campaign. “Our stand saw a 40 percent increase in sales since we joined the campaign,” said one blueberry farmer. “We attribute this to our appearance in the Local Hero ad campaign.”

INSTITUTIONAL BUYERS

As with restaurants, CISA didn't have the staff capacity to take on the institutional market when our campaign was just getting



“LIVE, FROM YOUR FARMERS MARKET...”

One farmers market that joined the Buy Local campaign caters to a bilingual audience, so CISA worked with another nonprofit to have the Buy Local banner translated into Spanish. We also worked out a deal with a local radio station to have them do live, remote broadcasts at the markets. The station raffled off chances to win a trip to an exotic destination, while CISA provided the runner-up prizes, such as food from local farmers. In between the action, the radio personalities interviewed market vendors. These broadcasts were a big hit. In the days preceding the broadcasts, the radio station would heavily promote them. All of this advertising was free to CISA and the farmers market. And the radio station was happy to have a place where they could draw a crowd for their contests.



off the ground. Now, in the fourth year of our campaign, we're looking at the volume of food that local colleges and other institutions buy and are seeing how much a few good partnerships could do for our farmers. But institutional buyers are sometimes viewed, mistakenly, as a potential cure-all for a local farm economy. "If only we can get State University to buy all our milk or eggs," the thought goes, "all our problems would be solved."

A careful analysis of your farmers, their interests and the context you are working in will help you decide if institutions have the potential to be a great source of business for your farmers—or a great big headache for your staff. We're finding that sometimes they can be both.

Buy Local activists often identify state-owned institutions and school systems as places that *should* serve locally grown food. Don't our community's children deserve the best, freshest, local milk and apples money can buy? Unfortunately, money is typically the first and biggest hurdle to institutional purchases of locally grown food. State institutions are often mandated to purchase from the lowest bidder as a cost savings measure. In our case, that means that local kids drink milk from dairy farms in Texas and California rather than from the cows down the road. This irony is not lost on our farmers (or yours either, we'd guess).

In one of our early forays into the institutional scene, we worked with the Massachusetts Department of Food and Agriculture and a local egg farmer to explore the possibility of getting local eggs into the dining halls of the University of Massachusetts, Amherst (UMass). There were many barriers to overcome, including:

- **Price.** Would the university be able to pay what the farmer determined was a fair price for the eggs?
- **Delivery.** Could the farmer meet the weekly delivery requirements of the university's central warehouse?
- **Payment.** Would the university be able to pay the farmer in a timely manner?
- **Previous vendor.** Would the winner of the university's food services contractor be willing to subcontract this part out to a



BERKSHIRE GROWN: Using Existing Businesses to Expand Local Product Distribution

"We have encouraged one local business—which makes pasta using local farm products—to deliver farm products as well. He now takes local tomatoes and goat cheese to more than 30 restaurants," said Berkshire Grown's Amy Cotler. "But this kind of business is not for everyone, which is why we try to focus on a diversity of farm businesses. Farmstands and markets, for example, do not require the same delivery infrastructure and may be more appropriate for some farms."

local vendor?

- **Supply.** What will happen if the local egg farm cannot meet the demand?

After extensive conversations with the state commissioner of agriculture, local elected officials, CISA folks, and interested UMass administrators, the university decided to start buying eggs from one of our participating farmers as a pilot project.

The farm provides UMass with eggs on a weekly basis, and delivers them directly to the central UMass warehouse, for a price that the farmer feels is fair. The farm supplies about a million eggs a year to UMass. The university has arranged for very timely payments to the farmer via its primary vendor. This is positive for the farmer and UMass doesn't have to step outside its primary vendor/bidding system. If the farm cannot provide the required eggs for some reason, the primary contractor can purchase them from the previous non-local vendor. The farm does not have a written agreement with UMass, but has had no problems to date, and has been delivering fresh, local eggs to the university for almost a year.

While this is a cursory explanation, the actual deal was intricate, complicated and involved persistence, insight and creativity from all parties involved. We hope that the success of this pilot will lead to easier deals in the future. Staff changes and bureaucracy can throw a wrench into things at any time, but the potential for larger volumes and the chance to reach college kids—future consumers of locally grown food—seems worth the effort.

*Buy Local activists
often identify state-
owned institutions
and school systems
as places that should
serve locally grown
food.*

DISTRIBUTORS

Distribution is another persistent stumbling block for local farmers and often impacts retail, institutional and restaurant purchases of locally grown food. Most businesses prefer as close to one-stop-shopping as they can get. Individual accounts mean more bookkeeping, more tracking and more attention from already busy people. Revamping local distribution systems, along with cracking the institutional buying code, are probably among the most ambitious projects your organization can pursue. Nevertheless, there may be opportunities in your community that are worth pursuing.

While this is a fairly small part of our work, CISA has worked with a local, farmer-owned co-operative distributor, the Pioneer Valley

Growers Association. This distributor transports produce to the Boston wholesale markets, about two hours away. From there, they deliver to the backdoors of some large chain grocery stores. The distributor works with about 100 large-scale growers throughout the Pioneer Valley. While the benefit to our farmers is small—we have very few large-scale (over 100 acres) produce growers in our campaign—the benefit to the farm community and consumers is large, as this distributor can meet the demands of a large grocery store.

Our role in this project is that of facilitator. We help the distributor and chain stores figure out a way to get the produce into the stores and help monitor the relationship to make sure that it is continuing.



RESOURCES: LOCAL FOOD IN THE MARKETPLACE

Attachments

Sample Letter of Understanding



**LETTER OF UNDERSTANDING
BETWEEN CISA AND [RETAILER]**

Listed below is an outline of the mutual responsibilities and expectations upon which Community Involved in Sustaining Agriculture (CISA) and retailers participating in the campaign have agreed to.

[NAME OF RETAILER] AGREES TO:

- Share confidential sales and financial information, for evaluative purposes only
- Do consumer outreach, such as “tastings” at the store and talking to the media
- Provide high-quality, locally grown products, when available
- Become a dues-paying member of CISA (\$50 suggested), if not already a member
- Send a store representative, when requested, to meet with other retailers and CISA staff to discuss campaign-related issues
- Use CISA’s Buy Locally Grown materials only to promote products *grown* in western Massachusetts

CISA AGREES TO:

- Provide results of consumer surveys and marketing trends analyses to [retailer]
- Provide [retailer] with coordinated and visible promotional support through the Buy Locally Grown campaign.
- Serve as organizer of media and consumer events that focus on the contribution of western Massachusetts retailers and producers to the local economy, quality of life and scenic beauty of the region
- Advocate for increased sales volume and market penetration of locally grown products through western Massachusetts retailers.
- Promote the long-term goals of profitability, stability and sustainable stewardship for the farming community of western Massachusetts.

CISA

[Date]

[Retailer Contact Name]
[Store Name]

[Date]

Please return a signed copy of this form to CISA and keep one copy for your records.

Chapter 11: Evaluation: Learning As You Go

One of the most important—and most often neglected—aspects of a Buy Local program is assessing your effectiveness and identifying the lessons learned; in other words, evaluation. Evaluation can help you take stock of the difference you're making, communicate about your accomplishments and identify ways to keep improving your Buy Local program. These are all central to your success.

To explore how evaluation might help you, we use this chapter of the toolkit to look at the following issues:

- Using evaluation as a tool for strengthening your Buy Local program
- Using the “learning loop” approach to evaluation
- Planning your evaluation
- Staffing your evaluation
- Analyzing your results
- Keeping your evaluation fresh

In the attachments we provide a variety of evaluation tools, including templates for retailer and grower surveys, and references if you want to learn more.

EVALUATION: A TOOL FOR STRENGTHENING YOUR BUY LOCAL PROGRAM

When there are so many immediate demands on your time, you may ask why you should make time for evaluation. At Community Involved in Sustaining Agriculture (CISA), we initially had our doubts too. But we've since found that our evaluation helps us:

- Think strategically and longer term
- Move ahead with a clear sense of what success could look like for us, our farmers and our partners
- Take stock of what's working well and what's not, and why



- Make mid-course corrections that improve our campaign and how we spend our money
- Document what we're accomplishing and communicate it to current and potential supporters
- Build our credibility by having solid data about our campaign's impact

And while evaluation takes time and energy, we think these benefits are more than worth it.

Pages 100 and 101 illustrate the kinds of information that evaluation helped us capture. This information was drawn from the consumer awareness survey conducted by our market researchers, and the surveys and interviews that our staff conducted with our farmers and retailers. We hope this will give you a flavor for how an evaluation can illuminate the progress your campaign is making. You will also find the executive summary of our 2001 post-campaign consumer research in the attachments to chapter 7.

*Evaluation can help
you take stock of the
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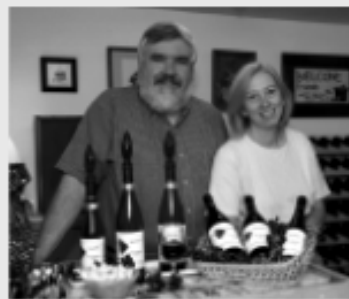
CISA

A Commitment to Community
and Small Farm Development



"I appreciated the media exposure and the spirit conveyed by Local Hero labels."

Dave Gott
The Benson Place
Heath



2001 Local Hero Campaign Convinces Consumers to Buy Local

For the third year in a row, CISA has convinced more consumers to buy local farm products. By placing advertisements in newspapers, on radio stations, on the sides of busses and in grocery stores and restaurants, CISA has penetrated the Franklin and Hampshire County markets with its "Be a Local Hero, Buy Locally Grown" message. Consumers are responding to the call to action and are searching for local food at farmers' markets, farmstands, grocery stores and in restaurants. As a result, sales of local farm products are increasing and local farmers are seeing increases in their income. CISA's impressive results are confirmed by annual polling data collected by Penn, Schoen and Berland, Inc., a nationally known research firm in Washington, DC.

78% AWARENESS

Consumers are aware of the *Local Hero* campaign and 78% can recall the major theme and slogan without being prompted by pollsters. At one grocery store where staff keep a basket full of buttons and stickers, a six-year-old boy pawed through the collection, ignoring Harry Potter and Pokemon logos to choose a "Be A Local Hero" button. Turning to his mom he said, "We buy local, don't we, Mom?"

86% FAVORABILITY

86% of the residents of western Massachusetts are favorable toward the advertisements and believe they make a convincing case for buying locally grown food. A CISA member was shopping for apples. Local apples were displayed next to imported varieties. Her eight-year-old son saw the local apples with the Local Hero sign hanging above them and said, "Mom, you have to buy those. They are better for all of us."

80% CONVINCED

More than 80% of those polled said the advertising made a convincing case about why people should buy locally grown food. They also agreed that it is important to continue the message so that residents are kept aware of the benefits of buying locally grown food.

57% -- LOCAL BUSINESSES BENEFITING

An owner of a small non-agricultural business in Hampshire County has told CISA that her customers say they support her shop instead of a big chain store in town because of Local Hero advertising. Survey data show that 57% respondents thought that the ads were convincing people to support local retailers and businesses unrelated to farming. 64% want restaurants to serve locally grown food, and the same number said they would support restaurants that made an effort to buy from local farmers.



"My garlic sold well at Foster's even though the retail price was much higher than the 'non-local' garlic."

Tom Ashley
Dancing Bear Farm
Leyden



"CISA is doing a good job at helping us sell more products, which helps us stay in business."

Pete Diemand
Diemand Farm
Wendell



Sales Increase for Local Hero farmers

More and more people are looking for local food at farm stands, farmers' markets and grocery stores. CISA, through radio and newspaper advertising, bus board ad placements, grocery store tastings, special food events, farmers' market promotions, website listings and an annual Farm Products Guide is continuing to tell the public where to find fresh, local food. And the public is responding by asking for "Local Hero" products and supporting farm businesses.

In 2001, CISA enrolled 62 farmers in its media program (up 50% from 2000), and 78% responded to a year-end survey. The results prove that advertising to promote local agriculture increases sales and profits for participating farmers.

- 74% reported product sales increases.
- 12% of the products listed increased up to 10%.
- 29% of products increased 10-20%.
- 40% of products increased 50% or more.
- 50% received higher prices in 2001 than in 2000.
- 78% (8 in 10) of Local Hero farmers reported increases in farm stand sales, 39% "significant" increases.

In 2001, John and Silvija Pipiras of Blue Haven Blueberry Farm in Southampton gained two new accounts for their pies because of referrals from CISA's farmer coordinator.

100% Use Advertising

Farmers are using Local Hero advertising to promote their farms and farm products. And CISA supports farmers who develop advertising campaigns of their own – traditional media ads as well as product labeling, website design, and brand development. Maryanne Ciesluk from Ciesluk's Farm Stand in Deerfield said, "The 'locally grown' and 'Local Hero' signs really help our business."

- 100% were featured in "Local Hero" newspaper ads.
- 95% used "We're a Local Hero Farm" road signs.
- 43% were featured in radio ads.
- 36% had their farm featured in a newspaper story.
- 26% had their farm featured in a radio story.
- 36% participated in "Local Hero" promotional events.

Farmers are experiencing notoriety because of the advertising. Chip and Sherry Hager from Hager Brothers Farm in Colrain said, "People recognize us now and ask us about our farm and our farm products."

Growing Respect for Farmers

Consumers understand the importance of protecting a local foods system. And because of farmers' markets, farm stands and CISA advertising, they are beginning to appreciate the people who are behind the products. A Local Hero farmer participating in his town's 2001 Labor Day Parade reported that people applauded when he passed by. He had been well received in years past, but he attributed a growing respect for farmers to CISA's advertising campaign.

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THE LEARNING LOOP APPROACH TO EVALUATION

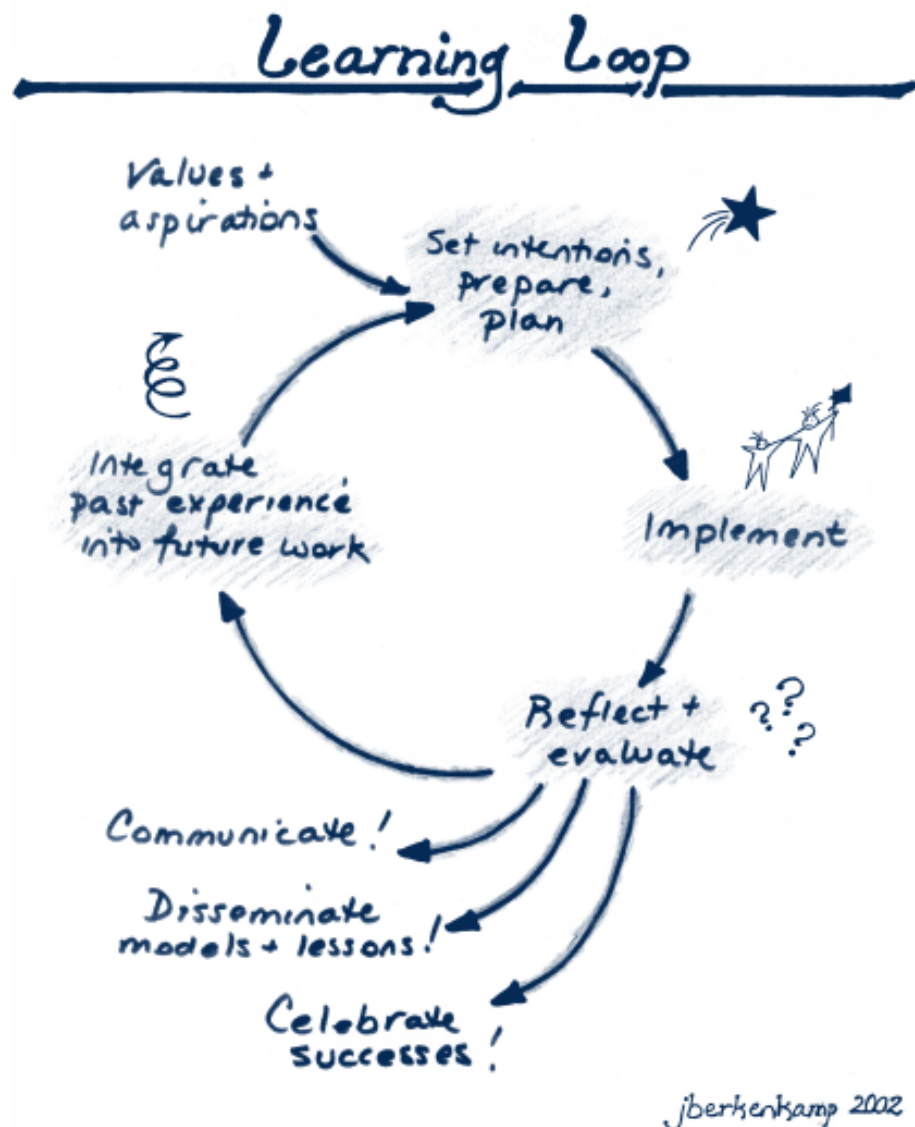
Before jumping in, we thought it might be helpful to talk about what we mean by “evaluation.” That word is used different ways by different people. Some folks think of it primarily as judging the effectiveness of something that’s over and done with. Others think of it as recording activities or counting up those things that can be measured numerically. Those are pieces of the pie, certainly, but we would encourage you to think of evaluation more holistically.

For instance, when FoodRoutes Network (formerly Fires of Hope) and CISA teamed up back in 1999 to design CISA’s evaluation plan, we grounded our effort in a philosophy FoodRoutes Network has come to call the “learning loop.” Introduced to us by JoAnne Berkenkamp (our evaluator and co-author of this toolkit), the learning loop model is

broader than “just evaluation.” It starts with good planning, then involved learning from what you do, and then uses what you’ve learned to make practical improvements in your campaign. While assessing outcomes is central to this process, we really wanted to use our evaluation to help us *improve* our Buy Local program. We wanted to learn from the evaluation process in a way that helped us be more effective. The learning loop approach helped us do that.

We hope that this approach, illustrated below, will be a powerful tool for the strategic development and management of your campaign

The learning loop has several key stages, some of which will occur and recur simultaneously. As shown in the (location) illustration, the loop begins by grounding your Buy Local work in the **values and**



aspirations of your organization, your partners and those you hope to serve. Those values and aspirations should be the foundation of any work your organization pursues.

Next is **setting your intentions and planning**, which includes both the planning of your Buy Local program and your evaluation. This is the stage where all of those pre-implementation activities occur—market research, conducting internal and external scans of your environment, developing budgets, and so on. This work positions you to move into the **implementation stage**. That is followed by **evaluating and reflecting** on your work, and then **integrating** what you’ve learned into future program plans.

These stages may occur simultaneously. For instance, you might occasionally revisit your plans, and we want to be learning all the time, right? But given all the demands we’re juggling, it’s not unusual to spend nearly all of our time on implementation. The other stages—particularly the one where we integrate what we’re learning into our future plans—often get short shrift. And that means we may not be taking the time to fully recognize the progress we’re making, sort out sticking points, and figure out how to improve our Buy Local work from one year to the next.

It’s also important to remember that *having* knowledge and actually *making practical use* of what you know are two different things. The rubber hits the road when you actively use what you’re learning to make your campaign stronger. And getting smarter and more confident about your work is the name of the game.

There are also three important spin-offs from the learning loop.

One is **communicating** your results. So often, good things are happening but we don’t take time to document and communicate about them to the outside world. CISA has found that sharing our results has also been critical for engaging farmers, retailers and others to our program.

Second, you may also have lessons learned and a campaign model that other communities could learn from. **Disseminating** your knowledge (as CISA and FoodRoutes Network are doing with this toolkit) can be helpful to other organizations and is a good way to

spread the word about how Buy Local programs can advance local food systems.

Lastly, by helping you identify your accomplishments and impacts, evaluation can give you reason to **celebrate**! And that’s something we can always use more of.

As much as anything, this approach to evaluation is a philosophy—a commitment to honestly assessing your effectiveness and learning from experience. It’s an attitude backed up by good planning, a broad sense of what “success” means for you and your stakeholders, and tools and systems that help you assess and learn as you go. We’ve found this approach helpful and encourage you to think about how you can use it in your own work.

Once you’ve decided that evaluation is something you want to do, developing an evaluation plan is your next step. In the next few pages, we outline some basic components of an evaluation plan that you can adapt to your own situation.

PLAN YOUR EVALUATION

When CISA started its evaluation planning, we focused on two basic questions that we cared a lot about:

- 1) What difference is our Buy Local program making?
- 2) What are we learning that can help us improve the program?

Our evaluation plan is structured around those lines of thinking, too—we try to assess the impact we’re having and we look for lessons learned. That led us to an evaluation plan with two core elements.


What are we learning that can help us improve the program?

First, we identified some of the key questions we would need answers to if we were to manage our new Buy Local program well. Especially in our first year, our list of questions was pretty long. The W.K. Kellogg Foundation, our primary funder, also wanted to better understand our work and asked us to include evaluation questions in our grant proposals. Some of the key questions we wanted to explore were:

- How is the Buy Local program benefiting our farmers, in both tangible and intangible ways? How do the results being



*... getting smarter
and more confident
about your work is
the name of the
game.*



Different stakeholders view the campaign from different perspectives.

Discussing your evaluation questions with them can help you understand those different beliefs and experiences.

achieved differ from our expectations and theirs? How could our Buy Local program better serve them?

- What communications channels and tactics are most effective at raising awareness of the campaign and why? How can our communications effort be improved next year? How can we best spend our advertising budget?
- What have we learned about enlisting retailers and restaurants in the campaign? What are the implications for how we work with them in the future?

These evaluation questions help us assess what's working well, what isn't, why, and how we can improve the campaign. The questions give us a framework for analyzing our experience and sorting out the implications of the more numerical data we're also gathering. Quantitative data alone will not tell you about success factors, barriers and implications, so it's important to pair your number gathering with this kind of analysis.

CISA's evaluation questions also became a reason to gather people together and talk about what we were learning individually and collectively. Different stakeholders view the campaign from different perspectives. Discussing your evaluation questions with them can help you understand those different beliefs and experiences. When you do this thinking together, it can also build teamwork and heighten ownership of your Buy Local program.

This process of reflection also helped CISA realize that we knew more than we sometimes gave ourselves credit for. At the same, it highlighted the gaps in our knowledge that needed addressing. The evaluation provided a framework for that dialogue. Each winter we sit down and take stock of what we've learned over the past campaign season, share those insights in a progress/evaluation report for our key funder, and integrate those lessons into our plans for next year.

What difference is our Buy Local program making?

The second big piece of our evaluation plan looks at outcomes and impacts—or as we like to put it: What are we accomplishing? (e.g., What Buy Local work is getting done?, What near-term progress is occurring?) and What difference is the Buy Local program

making for our stakeholders? (e.g., What medium- and long-term impacts are we having on farmers, consumers, etc.?) To get answers to these questions, our evaluation plan outlines the following pieces of information:

- Our overall goals
- The specific objectives we hope to achieve under each goal
- The various kinds of data, or indicators, we will gather to indicate what progress we're making toward our goals and objectives
- Our baseline data, our “starting point” when the campaign began for each of our indicators
- Our methodology for gathering each kind of data
- Our timeline for gathering the data
- How we'll staff data gathering.

To help us track this info, we use an evaluation matrix like the one on page 105.

CISA found that a matrix format gave a needed structure to our evaluation process. It also gave us an easy way to see where we had gaps or missing information, to record data as we got it, and to keep track of the evaluation tasks we needed to do at different times of the year. But keep in mind that evaluation plans can take many forms. The important thing is to find an approach that is straight-forward, relatively easy to maintain and suited to the unique qualities of your Buy Local program.

Now we look very briefly at some of the key pieces of an evaluation plan.

Goals: What Are You Trying to Accomplish?

The first step—clarifying your goals—is perhaps the most important one. CISA found that clarifying our goals was essential to our ability to manage our program. Clear goals are the foundation for your evaluation—if your goals are vague, it's pretty tough to evaluate whether you're pursuing them effectively or not. We define goals as the long-term change we want to occur as a result of our work. For instance, when CISA began its Buy Local program, our major goals were to:

- Increase the economic viability of farmers participating in the Local Hero campaign

CISA EVALUATION PLAN—SAMPLE

Goal 1: Increase the economic viability of growers participating in the “Local Hero” campaign

OBJECTIVES	INDICATORS: BASELINE & PROGRESS TO DATE	EVALUATION METHODOLOGY	WHEN TO MEASURE
<p>A Raise the number of participating growers to:</p> <ul style="list-style-type: none"> · 50 by Dec 2000 · 75 by Dec 2001 · 90 by Dec 2002 	<p>Baseline: Dec 98 = 0 growers</p> <p>Progress:</p> <ul style="list-style-type: none"> · May 99 = 16 growers · Dec 99 = 24 · Dec 2000 = 41 · Dec 2001 = 62 	Database of participating growers	Review total # of growers semi-annually in June and December
<p>B. Use Local Hero campaign to generate economic & non-economic benefits for participating growers</p>	<p>Indicators of potential benefits:</p> <ul style="list-style-type: none"> · New vendors · Increased farm gate sales · Higher prices · Increased # of customers at farm store/stand · Improved marketing and outreach tools · Networking with growers and retailers 	<ol style="list-style-type: none"> 1. Pre-season: interview participating growers to identify desired benefits. 2. Post-season written survey of all participants: <ul style="list-style-type: none"> · Rank benefits received and their importance to growers. · Document changes in farm gates sales, new vendors, prices, etc. 3. Interview one-third of participating growers in depth 	<ol style="list-style-type: none"> 1. May: Pre-season interviews 2. Nov/Dec: Post-season written surveys 3. Jan/Feb: Post-seasons interviews



Use a mix of quantitative and qualitative indicators. Some forms of progress can be captured numerically while others cannot.

- Promote the environmental stewardship of participating farmers
- Increase the sale of locally grown products through retailers and other outlets
- Ensure CISA's organizational health

You may find that clarifying your goals is harder than you expected. Or you might find that various folks in your Buy Local program have differing opinions about what your goals should be. Working through those differences is important, not only because your goals are the basis for your evaluation, but also because a clear sense of purpose is the basis for harmonious and productive relations with your partners and other participants.

Objectives: Making Progress Toward Your Goals

For each goal, you may have one or more specific objectives you hope to achieve. For instance, objectives related to a goal like “increase sales of locally grown products” might include: sign up two more natural food retail partners in the next six months, launch a restaurant program this year, or increase sales at three local farmers markets by 10 percent this summer. Objectives capture the progress you’re making toward your goals. The more specific, measurable and time-bound your objectives are, the better.

One way of identifying specific objectives is to complete the sentence, “We would feel successful if _____ occurred.” The ideas you insert in the blank space can be turned into objectives.

Indicators: What Are the Key Signs of Progress?

The next step is to identify indicators—measurable data points that capture the progress being made toward your goals and objectives.

For instance, one of CISA’s goals is to improve farmers’ economic viability. That’s a broad goal and one that’s hard to measure on its own. So we needed to choose some specific data points that we could track and that would indicate whether farmers’ economic situations were improving or not. We considered a variety of indicators before we settled on those that seemed to work best.

For instance, we thought about trying to assess how the Buy Local program was impacting the farmers’ bottom line, or net income. But a host of factors got in our way. One is that many other things influence a farmer’s bottom line that have nothing to do with the campaign, such as production costs that the campaign can’t influence and the methods a farmer uses to account for equipment, among many others. Also, very understandably, our farmers were reluctant to share their net income figures with us.

So instead of looking at net income, we asked them about gross farm sales. And we asked for the percentage changes in sales, not the total dollar value of their sales. Asking for a percentage change rather than a dollar value was a way of accommodating farmers’ legitimate need for privacy.

We found that farmers are typically willing and able to estimate percentage shifts in their gross sales. While a percentage change in sales figure doesn’t have quite the punch that a dollars sold figure has, it is data we can obtain while maintaining good relations with our farmers. You may also find that you need to balance these kinds of considerations, too.

CISA now uses a variety of indicators to track progress toward our main goals, including the:

- Number of participating farmers, retailers, restaurants and farmers markets
- Percentage of consumers polled who recalled the Buy Local campaign
- Percentage change in farmstand sales
- Number of new retail accounts that farmers gain
- Specific sustainable production practices used by participating farmers

- Number of people who are members of CISA

Here are a few tips for choosing your own indicators:

- Use a mix of quantitative and qualitative indicators. Some forms of progress can be captured numerically while others cannot.
- Choose indicators that your Buy Local program can directly influence and that aren't unduly influenced by outside factors.
- Choose indicators that can show meaningful change within the time period that you'll be gathering the data.
- Make sure you can actually gather the data. Can retailers' tracking systems really distinguish local from non-local food? Even if they can, are retailers willing to take the time needed to gather that data?
- Once you've chosen your indicators, try to stick with them so that you can gather trend data from one year to the next.
- Anticipate that your data will be imperfect.

Baseline Data: What's Your Starting Point?

After you've chosen your indicators, the next step is to gather your baseline data. Baseline data is simply the starting point that you measure your progress from. It's the "x" that allows you to say that the number of

participating farmers or dozens of local eggs sold changed from "x" to "y" from the first year to the second.

It's important to gather your baseline data *before* your campaign is launched. It's much more difficult, and sometimes impossible, to recreate data about sands that have already started shifting. Gathering baseline data up front will allow you to demonstrate that "y" is actually a significant improvement over "x." Knowing only the "y" is good, but being able to show the significance of that change is even better.

As seen in chapter 7, Market Research, a consumer survey is one way to gather baseline data on consumer attitudes about buying locally grown. Pre-campaign farmer, restaurant and retailer surveys are also a helpful, low-cost way of gauging your campaign's starting point.

Methodology: What Evaluation Tools Do You Need?

Now that you know which data are important to you, it's time to develop the tools you'll need to actually gather those data. There are many, many options. The three most important for CISA have been:

1. Formal consumer phone surveys conducted by our market research firm the winter after the busiest part of our campaign season (see chapter 7 for a sample report)



TIPS FOR GATHERING STAKEHOLDERS' FEEDBACK

- Make sure you're very clear about what information you really need. Pare your surveys down to what's most important and most realistic to obtain.
- Explain to your stakeholders why you want the information and what you'll do with it.
- Take care when you design survey questions. Ask questions that are concise and aren't subject to misinterpretation.
- Keep your surveys short and uncluttered.
- Respect people's time constraints and their privacy.
- Make it easy for people to respond.
- Follow up with your stakeholders to share the results of your evaluation.





CAPTURING THE INTANGIBLES

One of our favorite tasks at CISA is keeping a file filled with stories we hear about our Buy Local program. For instance, one farmer told us that our Farm Products Guide brought a customer to his farm early in the season, and that the customer spent enough in one trip to pay for four years' inclusion in the guide. Another farmer told us that his kids were often teased about being from a farm. But when their family's picture was featured prominently in a Local Hero newspaper ad, the teasing stopped and the kids' schoolmates took a new interest in their life on the farm.

These stories are colorful facets in the mosaic that is the Local Hero campaign. They are integral to what our program is about. And they are a valuable resource for news releases, public events, proposals and more.

We've also heard our funders and state legislators repeating these stories when discussing the campaign with other people. Such stories give people a way of talking about our campaign in a vivid, conversational way and they give our campaign a human touch.



2. Written surveys with our farmers, retailers, restaurants and other participants each winter
3. One-on-one interviews with a subset of our farmers, restaurants and retailers

The formal market research gives us data about the level of consumer awareness of our campaign, the percentage of consumers that said they were influenced to buy locally grown food, and the rates at which consumers recall various communication channels such as newspaper ads and point-of-purchase (POP) materials. Having a professional firm do this piece of the evaluation also gave us data that were statistically valid and

independently generated. That was critical when we needed data to use with the media, legislators and other stakeholders.

Our written surveys of farmers, retailers and restaurants give us quantitative data about farmers' new vendors, changes in farmstand sales, changes in prices received by farmers, and increases in the volume of local purchases by retailers and restaurants. You'll find templates for farmer and retailer surveys in the attachments at the end of this chapter.

One-on-one interviews are also important. Interviews tell us much more about the intangibles—interviewees' impressions and feelings about the campaign, their reasoning, the more nuanced ideas that people don't usually try to express in writing. Interviews were especially important in the first year of our campaign, when the campaign and many of our relationships were forming.

As Jaana Cutson of CISA said, "Many interviews with our farmers took place around the kitchen table. Farmers are very busy and were sometimes reluctant to meet with us. But once we got started, they wouldn't stop talking! And as conversations progressed, farmers would get more relaxed and would give feedback (both positive and negative) that they wouldn't have in writing or earlier in the conversation. While time consuming, talking together in a more relaxed atmosphere helps build relationships and create trust. It helps us to better understand farmers' points of view and their circumstances. And it's a great way of getting to know them as both farmers and friends."

CISA staff interview our retailer and restaurant partners each winter as well. Retailers tend to be very busy, so we've found it essential to be very clear about what we want to get from the interview and to keep it short. Few retailers will put much time into written surveys, so you may need to visit them in person if you want your survey to be completed on time. Personal interviews can be important for really understanding their perspective and building rapport. We've found that while some larger retailers are reluctant to provide data, they do appreciate that we are trying to understand how well the campaign is working for them.

Other evaluation tools we use include:

- Tracking our Web site hits
- Tracking our membership database

- Tracking the phone calls we receive
- Recording media appearances and readership/listenership
- Assessing the cost and utility of specific outreach tools (see the Evaluation Form for Individual Communications Tools in the attachments at the end of this chapter, which you may want to adapt to suit your own situation)

STAFFING: WHO IS RESPONSIBLE FOR DATA-GATHERING?

As you plan your evaluation, you'll also want to think about the staff resources needed to implement your evaluation. There's no doubt that evaluation takes time and skill. CISA found that a combination of staff and outside expertise is a good mix for us.

For instance, CISA began working with an external evaluator several months before we launched the campaign. We found that our evaluator provided direction and continuity when we were scrambling to design and run the campaign. Our evaluator lived far away, and CISA staff did nearly all the legwork to gather evaluation data. But it was helpful to get advice about clarifying our goals, designing our evaluation plan, developing surveys and thinking through the implications of the data we received. Our evaluator also helped us remobilize when we got stuck or de-energized. Having her show up on our doorstep periodically also made us focus on the evaluation and bring our staff together to reflect on what we learned and where we were headed.

However, engaging an evaluator takes money. And finding the right fit—of interpersonal chemistry, skills and philosophy—can be a challenge. On the other hand, trying to assess your own work objectively (and in the midst of so many other immediate demands) is a pretty tall order. Having that fresh and unbiased perspective along with some additional evaluation skills can be a big boost to your program. An outside evaluator can also build your staff's capacity to do good evaluation by bringing you new ideas and new tools. If you can swing it financially, we would encourage you to explore how an outside evaluator might help you.

Also, make sure that you budget time for staff to be involved in your evaluation. That's key to enabling people to help plan the



QUALITIES TO LOOK FOR IN AN EXTERNAL EVALUATOR

- Ability to see both the forest and the trees (e.g., they get the big picture, but can also stay on top of details).
- Good “radar” and observation skills.
- Strong verbal and written communications skills.
- Ability to engage with you as a team player.
- Adept at building trust. Brings positive energy and can handle delicate situations diplomatically.
- “Speaks your language” and brings knowledge of your issues.
- Fits in with your organization's culture and can adapt to your reality.
- Is committed to building your capacity and strengthening your campaign, and not only to documenting activities or writing an evaluation report.
- Has formal evaluation skills, or at least very strong analytical skills.
- Has a healthy dose of natural curiosity and a sense of humor—both are qualities that make evaluation more enjoyable.



TIPS FOR WORKING WITH AN OUTSIDE EVALUATOR

- Clarify roles. Have reasonable expectations about what you and the evaluator can do.
- Set clear timelines and deliverables.
- Give the evaluator opportunities to get to know you, your issues, your stakeholders, and to interact with your campaign over time.
- Do the work together. Make sure your staff and key partners feel ownership of the evaluation and understand its intentions and methods.
- Agree on how the evaluator should handle feedback that is unfavorable or that may be controversial.
- Commit to really *using* the information that your evaluation provides. The evaluator can provide recommendations but can't take action for you.

evaluation, participate in it, and explore its implications for their own work. And remember—if your folks don’t feel ownership of your evaluation, its benefit to them will probably be limited. Try to involve your staff and stakeholders throughout the process.

INTERPRET YOUR INFORMATION

Planning your evaluation and gathering data are really just the lead-up to an evaluation that makes a difference for your program. Analyzing those data and figuring out what they mean to you and your stakeholders is where the rubber hits the road. We’d encourage you to involve some of your farmers, retailers, board members and other stakeholders when you do this analysis. This can lead to a much richer discussion, one that builds teamwork and clarity of direction. You may find that this kind of discussion becomes an integral part of your organization’s annual meeting, campaign planning sessions, or other events.

Questions you may want to explore together include:

- What aspects of our Buy Local program worked well this season? Why? Which

aspects fell short of our hopes and why?

- What are the key lessons we learned?
- What are we proud of?
- What internal and external factors influenced our effectiveness this year?
- Is our definition of success changing?
- Given all of the above, what are the implications for our campaign? What aspects should we continue, expand, modify or de-emphasize next year?
- What else do we need to consider?

USE THESE INSIGHTS TO IMPROVE YOUR CAMPAIGN

The next—and perhaps most important stage—is to be proactive about applying these insights to your next round of activities. Given the time pressures we all live with, it’s easy to dive into more activities without taking the time to really reflect on the lessons learned from last time around. But Buy Local programs certainly aren’t cut-and-dried ventures; often they are experiments in which we test different approaches and keep looking for new opportunities and ways to improve.



TIPS FOR DOING HIGH-IMPACT EVALUATION

- Plan your evaluation early, preferably as part of your program planning.
- Make your evaluation a tool to help you manage, develop and communicate about your Buy Local program (not just document activity or identify shortcomings).
- Start by clarifying what you’re trying to accomplish and what success would look like for you and your stakeholders.
- Gather your baseline data early and use a variety of tools for gathering data.
- Create trust and reward honesty.
- Budget staff time to do evaluation work.
- Make your evaluation participatory.
- Integrate your evaluation with the work you already do and care about.
- Remember that efforts that didn’t succeed make for great learning opportunities.
- Keep it manageable. Be realistic about how much evaluation work you can do. Anticipate some frustration along the way.
- Reflect on the implications of the data and insights you’re gathering: commit to translating your experience into insight, and insight into action.
- Keep asking “Why?” and “What’s the lesson here?”
- Remember to celebrate the good stuff and tell others about it!

Explicitly integrating your lessons learned into future plans can help you become more effective and confident. You may also find that doing this exploration in a participatory way enables better decision-making and helps build buy-in for improvements to your Buy Local program.

COMMUNICATE YOUR RESULTS

Who should you tell about the progress you've made and the differences your Buy Local campaign is making in the community? This is a key question to ask yourself (and to keep asking yourself).

For instance, Jaana Cutson said that in the first year of CISA's evaluation, "we had data to show that the campaign was influencing consumers and making a difference for farmers—that was the big thing. That information was critical with both funders and participants. For them, the proof had to be in the pudding. Our results also generated media interest. We did news releases. We told people about our results at community events. We put our evaluation data front-and-center. It made reluctant farmers more willing to join the campaign. They saw it was working for other farmers, and that it was continuing. The evaluation also showed that we were serious about the campaign and that it wasn't a fly-by-night thing."

One tool that CISA uses to communicate its campaign results is the brochure provided in the attachments at the end of this chapter. We find that it gives us an attractive, concise summary to tell people what was accomplished. It's a great communications tool for our participants, partners, funders and staff.

KEEP YOUR EVALUATION FRESH

As your campaign evolves, your evaluation should too. Over time, you may find that the indicators you're using don't effectively capture your progress. Or your definition of success might change as new partners or constituencies get involved. You'll also find out which data points are critical and which aren't. CISA also started with the "Cadillac" of evaluation plans and has streamlined our scope and survey tools over time. Our evaluation has evolved from something new and somewhat disconnected from our day-to-day work into a more integral part of our program. It is becoming part of our culture, as we hope it is (or will be) for you.



TIPS FOR ECONOMIZING

If you're short on funds for evaluation, try some of these ideas:

- Engage a mixture of external consultants, staff, board and volunteers
- Use grad students, members, volunteers, etc., to do the legwork of gathering your data
- Do focus groups or other group events rather than more time-consuming one-on-one interviews
- Use interactions at farmer meetings, community events, your annual meeting and other events to generate qualitative data to help fill the gap (at least temporarily) if quantitative data are in short supply
- Offer prizes to encourage people to respond to your surveys without needing to be asked several times
- Streamline your list of indicators to those that are most important and reasonably easy to gather
- Use e-mail to increase the efficiency and ease of data collection



RESOURCES: EVALUATION

Outcomes for Success! 2000 Edition.

Available from the Evaluation Forum, Seattle, WA, (206) 269-0171.

Performance Scorecards: Measuring the Right Things in the Real World, Richard Change and Mark Morgan.

How to Evaluate Foundation Programs, Stacey Stockdill with Marlene Stoehr, Commissioned by The Saint Paul Foundation, Inc., 1993.

Management Assistance Program for Nonprofits Free Management Library, www.mapnp.org.

See planning and evaluation sections for materials and links to a wide variety of resources.

www.innonet.org

Online resources for program planning and evaluation.

Attachments

1999 Campaign Results Summary

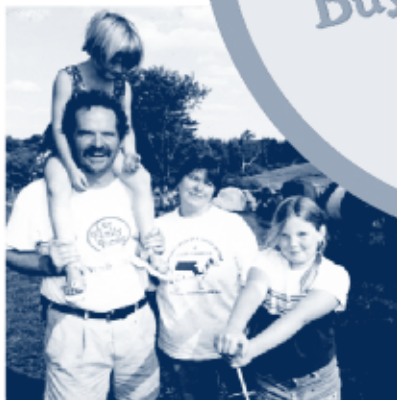
Sample Year-End Grower Survey

Sample Year-End Retailer Survey

Evaluation Form for Individual Communication Tools



Be A
Local Hero
Buy Locally Grown



1999 CAMPAIGN RESULTS SUMMARY



CISA's CAMPAIGN

Advertising:



Point of Purchase Materials:



NEWSPAPER

176 ads in 5 different local newspapers

RADIO

7 stations broadcasting 40+ spots daily

BUSBOARDS

72 busboards in Hampshire County



Public Relations:

RADIO

WHMP's CISA Farmers/Retailers Showcase

TELEVISION

Channel 22 News, national feed

EVENTS

Campaign Kick-off Luncheon, Mass Marketplace West, agricultural fairs, supermarket tastings

NEWSPAPER

Articles in the Recorder, Daily Hampshire Gazette, Springfield Union



Trade Show Booth:



Direct Mail:

62,000 households in Hampshire and Franklin Counties

THE RESULTS*

More than half of all those surveyed were aware of the *Be A Local Hero, Buy Locally Grown* campaign

53%

312 telephone interviews were conducted during the second week of October among primary food shoppers in Hampshire and Franklin Counties in Western Massachusetts.

Of those who were aware of the campaign, more than half were influenced to buy locally grown food!

61%

*Survey conducted by Penn, Schoen and Berland Associates of Washington, D.C., October 18, 1999

Improving Sales of Locally Grown Farm Products

Farmers who participated in the campaign have seen demand for their products increase. Pete Diemand of Diemand's Egg Farm tells us that he's seen a significant increase in egg sales at two participating "Local Hero" campaign stores; in fact, sales at one store are up 50% over past levels. Farmers from *Our Family Farms* milk co-op said their September sales were up, compared to last year. Bird Haven Blueberry Farm and West Branch Farm Products saw an increase in people visiting their farms this year. Dave



Nichols of Hilltown Dairy says that he has picked up new business and is pleased with sales at his farm stand. Many of our participating farmers report that they have picked up new retail outlets for their products because of the campaign. These results show that sales of locally grown products increase when people are encouraged to buy them. Through this ongoing campaign we are able to build a community-wide movement in support of our region's agricultural foundation and to help keep our local farms in business.

Here's what some participating retailers are saying:

"We sold considerably more *Our Family Farms* milk, just about double compared to the previous summer, now that we have a *Be A Local Hero* sign above the milk."

—Chris Cavallari
Serio's Market

"Sales of campaign products went up because of the shelf talkers and stickers. I was very impressed with CISA's *Buy Locally Grown* materials."

—Mike McCusker
McCusker's Market

"CISA's *Be A Local Hero, Buy Locally Grown* campaign helped us promote local farm products to our customers. The point-of-sale materials were very effective in increasing the visibility of local products in our stores in Hampshire and Franklin Counties. We are currently considering ways to increase our participation next season."

—Mark McGowan
Stop & Shop

Comments from our customers about CISA's *Buy Locally Grown* campaign have been positive. Our produce sales definitely increased, which is odd because produce in the summer usually declines in sales as people go to farmers' markets and farms stands and grow their own gardens. But we definitely sold more produce than the previous summer."

—Suzette Snow-Cobb
Green Fields Market

"We thought the radio ads were nice, and we liked the farmers' face newspaper ads. It makes an impact on people—we heard them talking about the ads, and people notice the stickers and it helps."

—Harvey Phelps and Sam Dean
Foster's Supermarket

"The point of purchase materials helped sales and made a difference. The campaign is providing the connection between the farmer and the consumer that is so important."

—Matt Vergo and Matt Boulanger
Bread & Circus



893 West Street, Amherst, MA 01002-5001
Telephone: 413-559-5338 Fax: 413-559-5404
Visit our Web site at www.buylocalfood.com

Sample Year-End Grower Survey

Your Name: _____

Date: _____

What products did you grow in 2001?

- ☐ Vegetables _____
- ☐ Fruit _____
- ☐ Meat or poultry _____
- ☐ Dairy _____
- ☐ Value-added products _____
- ☐ Other _____

What % were they of your total farm sales?

_____ %
 _____ %
 _____ %
 _____ %
 _____ %
 _____ %

What single product would consumers most readily associate with your farm?

Where do you sell your products?

- ☐ At farmers markets _____
- ☐ At a farm stand _____
- ☐ Through other direct sales to individuals _____
- ☐ Directly to restaurants _____
- ☐ Directly to grocery stores _____
- ☐ Directly to institutional buyers (e.g., colleges) _____
- ☐ To wholesalers _____
- ☐ Others _____

This represents what % of your total farm sales:

What percentage of your 2001 sales were made to buyers in the “local area”?

(indicate here how your campaign defines “local”)

_____ %

Did your farm use any of these advertising channels in 2001:

- ☐ Television (*list stations*) _____
- ☐ Radio (*list stations*) _____
- ☐ Newspapers (*list newspapers*) _____
- ☐ Roadside signs _____
- ☐ Direct mail _____
- ☐ Posters, handbills, etc. _____
- ☐ Internet _____

Was this part of the XX Buy Local campaign?

_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No

Did your farm do any of the following activities in 2001:

- ☐ Used your own logo
- ☐ Participated in promotional events
- ☐ Distributed promotional literature
- ☐ Distributed coupons
- ☐ Managed a mailing list
- ☐ Had your farm featured in a news story
- ☐ Had your farm features in a radio story
- ☐ Invited the public to your farm
- ☐ Other _____

Was this part of the XX Buy Local marketing and outreach campaign?

_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No
_____ Yes	_____ No

How have you benefited from participating in the Buy Local Campaign in 2001?

Please rate the following statements on a scale of one (1) to five (5):

1- Strongly disagree, 2- Disagree, 3- Neutral, 4- Agree, 5- Strongly agree

The campaign has helped distinguish my farm's products from others in the marketplace.	1	2	3	4	5
The campaign provides advertising and outreach tools that enhance the marketing of my products.	1	2	3	4	5
Participating in the campaign has enhanced my business with existing customers.	1	2	3	4	5
The campaign has helped me access new markets and new vendors.	1	2	3	4	5
Campaign-related opportunities to network with other farmers are valuable to me.	1	2	3	4	5
Campaign-related opportunities to network with retailers and other vendors are valuable to me.	1	2	3	4	5
The campaign has enhanced the security of my farm income.	1	2	3	4	5
The campaign's media and public relations work has created greater community awareness of locally grown food.	1	2	3	4	5

Products Sales and Prices

The campaign has helped increase sales of my products. 1 2 3 4 5

In the past year, my sales have increased due to the campaign by:

_____ 0% _____ 1–5% _____ 6–10% _____ 11–20% _____ more than 20%

The Campaign helped raise the prices I receive. 1 2 3 4 5

On average, the campaign has helped raise the prices I receive by:

_____ 0% _____ 1–5% _____ 6–10% _____ 11–20% _____ more than 20%

What other benefits have you gained from the Buy Local campaign?

How useful are the Buy Local marketing materials?

Please rate the following marketing materials on a scale of one (1) to five (5):

1- Not at all useful, 2- Not very useful, 3- Neutral, 4- Useful, 5- Very useful

N/A – I have not tried to use this material

1” x 2” stickers	N/A	1	2	3	4	5
Banners	N/A	1	2	3	4	5
Posters	N/A	1	2	3	4	5
Local Hero yard signs	N/A	1	2	3	4	5

The overall usefulness of XX Buy Local marketing materials is: 1 2 3 4 5

How could our campaign improve the marketing materials we currently use?

What other marketing materials would be helpful to you?

Support from XX Organization's staff

Please rate the following statements on a scale of one (1) to five (5):

1- Strongly disagree, 2- Disagree, 3- Neutral, 4- Agree, 5- Strongly agree

XX organization understands my situation and goals.	1	2	3	4	5
XX is open and responsive to new ideas for improving the Buy Local campaign.	1	2	3	4	5
XX staff is available when I need to speak with them.	1	2	3	4	5
I am pleased with my interaction with XX staff.	1	2	3	4	5

Improving the Buy Local Campaign

1. How could the XX campaign have better served you in 2001?
2. What steps could we take to improve the Buy Local campaign in 2002?
3. What other suggestions or feedback do you have?

I intend to participate in the campaign next year: _____ Yes _____ No

Please send your completed survey by **XX date** to:
(Provide your contact info here)

Thank you!

Sample Year-End Retailer Survey

Your Name/Store: _____ Date: _____

Sales of Local Hero Products

Please indicate what local products you sold in 2001:

Product	Amt Sold
	\$
_____	_____
_____	_____
_____	_____
_____	_____

Which of these products would you like to carry more of next year?

What additional local products would you like to carry?

How did your sales of local products change in 2001 relative to last year?

- ☐ Increased more than 20%
- ☐ Increased 11%–20%
- ☐ Increased 6%–10%
- ☐ Increased 1%–5%
- ☐ Did not change
- ☐ Decreased

On average, did you pay more for local products than similar products from non-local sources in 2001?

- ☐ More than 10% higher than similar products from non-local sources
- ☐ 6%–10% higher
- ☐ 3%–5% higher
- ☐ 1%–2% higher
- ☐ No difference
- ☐ Paid less for local products

Please rate Local Hero products overall:	<i>Very Poor</i>	<i>Poor</i>	<i>Average</i>	<i>Good</i>	<i>Very Good</i>
Product Quality	1	2	3	4	5
Product Supply	1	2	3	4	5
Product Movement	1	2	3	4	5

What percentage of your (produce) sales were from local growers in 2001? _____%

What percentage would you like to locally source in 2002? _____%

How many local farmers did you purchase from directly in 2001? _____

How many of those farmers are new accounts (e.g., farmers you had not purchased from in prior years)? _____

Promotional Materials

Please rate the following:	<i>Very Poor</i>	<i>Poor</i>	<i>Average</i>	<i>Good</i>	<i>Very Good</i>
Posters	1	2	3	4	5
4" x 6" shelf talkers	1	2	3	4	5
2" x 3" shelf talkers	1	2	3	4	5
6" round logo/wire stand	1	2	3	4	5
Local Hero stickers	1	2	3	4	5
Satin "state fair" ribbon	1	2	3	4	5
In-store demonstrations	1	2	3	4	5
Overall Rating	1	2	3	4	5

We use Local Hero promotional materials:

- ☐ Consistently throughout the season
- ☐ Frequently
- ☐ On occasion
- ☐ Rarely
- ☐ Never

How could the Local Hero campaign improve our marketing materials and in-store events?

Benefits of Participating in the Local Hero Campaign

Please rate the following statements on a scale of one (1) to five (5):
1- Strongly disagree, 2- Disagree, 3- Neutral, 4- Agree, 5- Strongly agree

Our store has benefited from participating in the Campaign in the following ways:

Fresher, higher quality produce	1	2	3	4	5
Increased product choice for consumers	1	2	3	4	5
Increased product sales	1	2	3	4	5
Built relationships with local growers	1	2	3	4	5
Improved public image of store	1	2	3	4	5
Received help with marketing & promotions	1	2	3	4	5

Please describe other benefits you have received:

Our customers' response to the Local Hero campaign has been:

- ☐ Very positive
- ☐ Positive
- ☐ Neutral
- ☐ Negative

Please rate the following statements on a scale of one (1) to five (5):
1- Strongly disagree, 2- Disagree, 3- Neutral, 4- Agree, 5- Strongly agree

My staff are well-equipped to answer consumers' questions about the Local Hero campaign.	1	2	3	4	5
--	---	---	---	---	---

I am pleased with my interaction with Local Hero campaign staff.	1	2	3	4	5
--	---	---	---	---	---

I would give the Local Hero campaign an overall rating of _____
(1 = Very Poor, 5 = Very Good)

Improving the Buy Local Campaign

How could the Local Hero campaign have better served you in 2001?

What steps could we take to improve the Buy Local campaign in 2002?

What other suggestions or feedback do you have?

I intend to participate in the Local Hero campaign next year: _____ Yes _____ No

Please send your completed survey by **XX date** to:
(Provide your contact info here)

Thank you!

Evaluation Form for Individual Communication Tools

Outreach tool: (e.g., 2” rectangular sticker; T-shirt; radio ad)

Intended audience:

Used by whom/when/where/how often:

Total cost and number produced:

Cost per piece:

Results to date. What worked about it? What didn’t? Why? Cost-effectiveness?

Overall rating (on a scale of 1–5) _____

Would we use this tool again? What changes should we make to it?



Chapter 12: Launching Your Program

It's essential to have your ducks in a row before you formally launch your campaign and begin attracting the interest (and scrutiny) of consumers and the media. You may also want to use one or a series of community events to kick off your campaign. Such events can be a great way create a splash and engage a wide array of citizens, farmers, retailers, partner organizations, political figures, business people, the media and others in your Buy Local program.

This chapter explores those issues, particularly:

- Campaign elements you should have in place before you formally launch
- The ups and downs of CISA's launch experience
- Thoughts about staging kick-off events
- Discussion questions to help you assess your readiness to kick off your campaign

BEFORE YOU LAUNCH

Before you launch your campaign on a significant scale, you'll want to have key components of your Buy Local program in place and ready to roll. Here are some that Community Involved in Sustaining Agriculture (CISA) has found most important.

- **An appropriate number of farmers, retailers and/or other purveyors of local food** signed on to your campaign. CISA had about 16 farmers and six retailers (both large and small) on board when we launched. This was a good number to start with. It gave us some product diversity without being too many farms to manage as we were starting out. Striking that balance is important, both to the public who you are asking to buy locally grown food, and to your staff who are realizing for the first time what it means to actually run a program like this.
- **Plenty of local products** available in grocery stores and other outlets. You may need to do some coordination between farmers and retailers to make sure that the food is on the shelves when it needs to



be. While you may not want to serve as a broker for very long, we'd encourage you to do whatever is necessary to make sure consumers can find local food once you begin advertising.

- Make sure your retail outlets, restaurants, farmstands, etc., have **plenty of point-of-purchase (POP) materials**, know how to use them and are ready to start using them at the appropriate time.
- Have your **outreach and communications efforts planned and ready**. These may include newspaper and radio ads or other paid media, media interviews for your staff and stakeholders, news releases, in-store events with your farmers, and more.
- **Written agreements** with participants and clearly documented campaign policies.
- Plans for a **high energy, very visible event** to launch your campaign (or several events, if they suit your purposes). Make sure you have a strategy for enticing the media to come to your event and prime them to deliver the most important messages about your campaign.

Our experience was that the more prepared you are before you formally launch your campaign, the better your life will be. CISA folks had a great time at our launch event, but it was stressful. And there were a few key pieces that we didn't have in place.

Make sure you have a strategy for enticing the media to come to your event and prime them to deliver the most important messages about your campaign.



Keep in mind that once you formally launch, you will enter a new phase of the campaign—a phase that may involve bouts of excitement and fear, gratification and regret.

For instance, we didn't get our POP materials into the stores until a week *after* the launch. And then we realized that there was an important policy issue that we hadn't sorted out: could retailers use our POP materials to promote only products from Local Hero farmers or to promote all local products? What about locally *manufactured* products, not just locally grown ones? We didn't want to exclude some local products, but also wanted farmers to have an incentive to join the campaign. The frenzy to reach closure on this issue illustrates how important policy decisions can be—and that such decisions are much easier to make before the horse is out of the barn.

Suffice it to say, CISA didn't have a clear launch plan that outlined exactly what issues we needed to address, what tasks needed to happen in what sequence, who would do what by when, etc. Having that plan would have made the run up to our launch date less chaotic. And that would have made our staff a little saner and much more at ease with the big unknown we were heading into. As a result, we encourage you to take stock of the various pieces you need to have in place before you launch and then plan accordingly.

Also keep in mind that once you formally launch, you will enter a new phase of the campaign—a phase that may involve bouts of excitement and fear, gratification and regret. We found that it helps your campaign keep an even keel if you anticipate and acknowledge the range of emotions that this experience may trigger in those staff, board members, farmers and partners who bear much of the responsibility.

The Big Event

Our big community event marked the formal launch of CISA's Buy Local campaign in June 1999. We looked at our launch event as a party celebrating the community of people committed to local farming and local food. For you, that community might include farmers, retailers, restaurants, the media, politicians, institutions, the public and others.

We found that engaging our community during the launch was essential for building a sense of team spirit, creating early visibility for the campaign, and celebrating this new effort to bolster agriculture in our region. We also found that folks will come to an

event if they think it offers something for them. As Margaret Christie, our former executive director, said, "Our retail awards got the retailers there. The politicians' presence got the media there. Our loyal farmers came. And everyone enjoyed the great food." CISA tried to ensure that all of our stakeholders had a good reason to come to the launch and that they enjoyed it once they got there.

For instance, we had some of our friends in the state legislature come and offer words of encouragement. Having politicians lined up to participate in advance was probably the key factor in motivating the media to come. Without our legislators and the commissioner of agriculture there, we probably wouldn't have gotten the media coverage we did. Having our political leaders speak briefly—with commentary that we helped prepare—also gave the media great sound bites that reflected our core messages.

Our participating farmers came out as well. They were integral to the event, giving the campaign credibility and legitimacy. Soon, other farmers who had been skeptical about the campaign (but then saw some great TV stories and newspaper articles about the launch) called to join us. These were often the same folks who wouldn't return our calls before the launch. The launch and early media coverage were a great way to engage farmers that needed to see some signs of legitimacy before they would get involved.

PLANNING YOUR LAUNCH EVENT

Here is just some of the planning that went into CISA's launch event.

Location, Location, Location

CISA agonized over the location for our launch. Was there a farm that would let us use a field? What about a grange hall? Church basement? We debated the pros and cons of each site and the infrastructure that we would need to bring to each one.

Our launch was in late June, the height of the local strawberry harvest. One of our early joiners was a strawberry farmer with considerable acreage. He agreed to let us use one of his fallow fields. So we set about renting a tent, public address system, generator, port-a-potties, tables, chairs and more to create a comfortable spot for

people to come to. Luckily we had rented large, freestanding fans for under the tent. An early heat wave struck suddenly and those fans saved the day.

Despite the heat and myriad logistical details, holding the launch on a farm highlighted the campaign's authenticity and it signaled the centrality of farmers to our work. The images of a local farm also came across nicely in the resulting media coverage.

Good Eats

Locally grown food was central to our event. We tried to have a variety and to highlight it throughout the event. We had farmers bring “fresh from the field” items like greens, berries and milk to give out as samples. A few cases of local hard cider helped relax the crowd.

We hired a caterer to prepare the bulk of the food. It really helps to find a caterer who is enthusiastic about using as much local food as possible. Be sure to make it clear up front that locally grown is what you want, even if you have to buy the food yourself and bring it to the caterer.

It may be tempting to think that volunteers can prepare all of the food. While volunteers may save you money, they are rarely as organized or efficient as an experienced caterer—and they might drop out at the last minute. Tables laden with local food and quick, efficient service will reinforce the impression that your campaign is well organized.

Giving Recognition

With the help of the Massachusetts Department of Food and Agriculture, we gave out awards to area retailers. The awards helped spark a large turnout from retailers (including several who hadn't yet signed on), and they also enjoyed the photo opportunities with the media.

Visuals

It's also important to think about the visuals around the event site. You want the event to be celebratory and photogenic. Our media consultant did a good job of creating a colorful backdrop for the event. He hired a photographer months before the kickoff to take pictures of farmers, farms and local food. The photos were then turned into a massive collage that was posted on one side

of the tent. We also had one of our bus signs made into a banner that stretched across the other side. Farmers' food displays and samples, flowers and other decorations completed the festive scene and helped attendees connect with our farmers and our message.

EARLY SUCCESSES. . .AND SNAFUS

The Local Hero campaign really came alive at the launch event and in the weeks that followed. One of the best results from our launch as the new relationships farmers forged with local retailers. Farmers reported that they met retailers they had wanted to meet for a long time, and made deals to get products into their stores. One local egg producer saw an immediate 50 percent increase in sales at a local store in the weeks following the launch. And as mentioned above, we also got some great publicity, which proved to be a great recruitment tool for CISA.

Six months after the launch event we had several new retail partners, as well as more farmers. The event also prompted a somewhat indignant letter from a local restaurant owner, suggesting that we also work with local restaurants. His interest pointed out another gap in our plan. Although we had our hands full trying to set up our retail program, we asked the restaurateur to participate in a new planning committee. We worked with his and other restaurants that winter to plan a restaurant program that began in the second year of our campaign.

Our retail awards got the retailers there. The politicians' presence got the media there. Our loyal farmers came. And everyone enjoyed the great food.



... strong relationships with participants, good planning, clear policies, a sense of humor and an openness to possibility should serve you well as you begin your campaign and work to broaden its impact.



Remember that once your campaign launch is over, your work is just beginning. Your workload may increase exponentially as more people become aware of your campaign and more potential participants want to join. As you have seen from our experience, strong relationships with participants, good planning, clear policies, a sense of humor and an openness to possibility should serve you well as you begin your campaign and work to broaden its impact.

ARE YOU READY TO LAUNCH?

As your launch date approaches, bring your campaign team together to make sure you have all of the pieces in place. Discuss the following questions:

- How many retail and farm participants will you need to meet the consumer demand sparked by your campaign? Do you have enough participants involved?
- Have you taken steps to ensure that plenty of local food will be on store shelves when you launch?
- Have you identified the various campaign policies you'll need? Have you developed them and put them into place?
- Do you have appropriate, signed written agreements with your participating farmers, retailers, institutional partners and others?
- What POP materials will you need? Are your retail partners and farmers trained and ready to use them properly?
- Have you developed positive relationships with local media? Have you primed them to cover your work? Have you lined up interviews and other engagements for your staff, farmers and partners?
- Are your newspaper, radio or other ads and community outreach materials ready? Do you have a schedule and process for placing the ads?
- Have you planned a high-energy, high-visibility event that will engage your community, partners, the media and others, and serve as a fitting kickoff for your Buy Local program?

Chapter 13: Keeping It Going

So far we've focused on the ingredients that go into designing and launching a Buy Local campaign. Now we look at what it takes to keep the program going.

The scale and complexity of your campaign will greatly influence the resources you'll need. We share our experience in hopes that it will give you a benchmark for planning your own needs in the years after your launch.

Below, we explore three key dimensions of maintaining a Buy Local program:

- Activities that keep the program humming
- The skills necessary to run the program
- Adequate staffing

WHAT ACTIVITIES WILL NEED TO BE DONE?

For Community Involved in Sustaining Agriculture (CISA), the following activities have been central to keeping our Buy Local program going:

- Community outreach and events
- Ongoing recruitment of farmers, retailers, restaurants and other partners
- Coordination with retail partners: spot checking current ones and training new ones
- Updating and placing your advertisements, point-of-purchase (POP) and other campaign materials
- Maintaining relationships with the media and securing coverage of your program
- Maintaining relations with participants and institutional partners
- Evaluating your work and continually improving your program
- Generating funds
- Oversight and management

WHAT SKILLS ARE MOST CRITICAL?

As this toolkit shows, a Buy Local program



requires a wide variety of skills to be effective. Among those we've found most important are:


- Ability to work with farmers and retailers and an understanding of their businesses
- Community organizing and outreach
- Media and/or formal communications
- Design, layout and desktop publishing
- Planning and evaluation
- Fundraising and planning for financial sustainability

HOW MANY PEOPLE WILL IT TAKE?

Since the beginning of CISA's campaign, our organization has had four full-time staff: an executive director, a campaign coordinator, a program coordinator (to handle our other programs and pitch in on the campaign) and an office manager. This has proven to be the minimum number sufficient to manage our campaign and various other programs simultaneously. We recently added a fundraiser.

While we make extensive use of our board of directors and member volunteers, CISA has found that having a core of full-time staff is invaluable, particularly early in the campaign. But before we launched, we thought that one full-time staff person would be enough to manage our campaign. That turned out to be a woeful underestimate.

The scale and complexity of your campaign will greatly influence the resources you'll need.



As we approach the fourth year of our campaign, CISA is encountering a new crop of questions about how to move ahead.

So, during the first summer of the campaign, we hired a part-time consultant to work with the campaign coordinator on recruitment and other campaign tasks. Two other CISA staff contribute about one-third of their time to the campaign and its evaluation. While the initial summer of the campaign required a Herculean effort, subsequent seasons have been more manageable. Since 2000, we've had a full-time campaign coordinator, an executive director who spends about half-time on the campaign, a staff member who spends about 10 percent of her time on campaign evaluation, and additional help on an as-needed basis. That adds up to about three full-time equivalents over the course of the year.

THE NEXT CHAPTER: QUESTIONS WE ARE ASKING OURSELVES

As we approach the fourth year of our campaign, CISA is encountering a new crop of questions about how to move ahead. While we had several very positive years, new challenges continue to present themselves. We have highlighted some of these issues in the hope that they will alert you to questions that may be important for your long-term success as well.

How Will We Keep Funding Our Campaign?

CISA was fortunate to have had three solid years of funding for a significant portion of our campaign. Now we're looking to diversify our funding. Raising our participant fees, exploring earned revenue, and engaging local businesses are among the avenues CISA is pursuing.

In our largely rural community, and perhaps in yours, there is a dire need for local, sustainable economic development. Your local banks and businesses need to understand how important a vibrant rural economy, based on farming, can be to your community. CISA is cultivating relationships with such organizations in the hope that they will see the merit of our work and join us in continuing it.

We've also taken steps to raise our participant fees. It is perfectly understandable to have nominal fees early in your campaign before you have a track record. But once your campaign starts getting results, you may

want to increase your fees so that they meet a larger portion of your campaign costs. On more than one occasion CISA has been told by participating farmers that the value they get from our campaign far exceeds the cost to join and participate. The challenge is encouraging your participants to pay more for that value. At the beginning of 2002 we raised our annual farmer fee from \$35 to \$100 and, as yet, have not had any participants balk at the increase.

What Is the Right Mix of Staff, Volunteers, Board Members and Consultants?

As our Buy Local program evolves, how can we best staff it? How can we best balance what we need to do with what we can afford? Key questions CISA is now exploring include:

- How do we want our campaign to grow and change in the years ahead?
- What work will be needed?
- What skills will be required to succeed?
- How much staff time will be needed at different times of the year?
- What roles can board members, interns and volunteers play?
- How should consultants and other service providers fit into the mix?

The question of how to find the best combination of staff and outside service providers is one CISA continues to wrestle with. Using consultants has some advantages—no payroll taxes or health insurance payments—but it also raises some fundamental questions.

Can a part-time consultant give your participants the level of service and responsiveness they deserve? Is paying a consultant's hourly fee a better deal than employing someone to do the same work? If you out-source much of the work, will your campaign have the same degree of cohesiveness, commitment and availability as in-house staff would? How might the use of consultants influence your organization's culture or its relationship to its membership and partners? As you think about your own staff structure, we'd encourage you to take a hard look at these issues and find the structure that serves you best.

When to Expand? When to Scale Back?

At some point, you may question whether to expand or scale back your campaign. If you enjoy some early successes, you may soon start envisioning all of the improvements and expansions you'd like to make. It can also be tempting to respond to new ideas from your community and begin adding new features to your program. But it is important to carefully consider the implications of these choices. Each will place new and different demands on your staff, volunteer base, finances and more.

And while no one wants to consider scaling back, we may all face it at one point or another. If your program is successful, the general community and your participants will want to keep it going. If you cannot raise enough funds to do so, you will have to make hard decisions about what to keep and what to set aside. While it may be tempting to discard expensive media advertising in favor of events and appearances that can be done with volunteers, look to your evaluation to determine what you can pare down to and still be effective.

Do We Need to Reinvent Our Campaign?

Some marketing experts suggest that a public awareness campaign needs to be reworked periodically in order to stay fresh in the public's mind. This is contrasted by another marketing maxim: it takes numerous repetitions for your message to get through to consumers—saturation over an extended period with the same message is essential. How do you reconcile these views? How do you respond when funders, staff or board members express desire for something new, even when the course you've embarked on shows results?

Having just completed the consumer survey of our third year, CISA's data are showing that consumer awareness of our program and the percentage of people who are spurred to buy local has not waned. Our figures have been surprisingly steady over the past three years. As a result, we remain confident that our campaign strategies, slogan and materials are still on the right track. For the time being, CISA intends to carry on with the communications strategies that brought us this far, adjusting our use of various communications channels and POP materials in response to the consumer and retailer feedback we receive each year.

Can It Get Too Big?

In the early days of your campaign, you may be trying like crazy (as CISA was) to recruit more farmers, retailers and other participants. By the time our third year ended, CISA counted 65 farmers, 15 retailers, 12 restaurants and eight farmers markets among our participants. But at what point should you step back and ask whether more growth is a good thing?

Why not start working with local food manufacturers? Or any local businesses? After all, they're local too. How can we balance the desire to embrace all those who support local agriculture with the limitations of our staff capacity and financial resources? There are myriad factors that come into play with such questions. Many of those questions will be unique to your circumstances and the aspirations of your community.

As you ask yourself these questions, remember to give serious consideration to your ability to bear the financial costs of expansion. For instance, when CISA adds one new farmer, we incur the following costs:

- \$120 in staff time for the initial enrollment paperwork
- \$250 in professional photo fees
- \$150 for an annual newspaper ad that features the farmer

This does not include all of the other work we do with our farmers, including getting their information on our Web site, helping them network with retailers and restaurants, seeking their input for our evaluation, getting them POP materials, troubleshooting, coordinating, and more. We want to support as many farmers as we can. But we also need to balance that enthusiasm with our commitment to running programs that are of a high and consistent quality.

Having well-designed plans and open lines of communication with your community will help you make choices that best support those you are trying serve. To that end, we encourage all of you who are reading this toolkit to think ahead. Dream big. And pursue your dreams with the combination of passion, realism and creativity that can best advance the goals of your campaign and the aspirations of your community.



... think ahead.

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PHOTO CAPTIONS AND CREDITS

Front cover (clockwise from top left): Sylvija and John Pipiras, Bird Haven Blueberry Farm, Southampton; Locally grown fall squash; Jim Pitts, Delta Organic Farm, Amherst; Cows, stock photo

Page i: Ryan Voiland, Red Fire Farm, Granby

Page 1: Locally grown fall squash

Page 2: Clare Bateman, Running Fox Farm, Worthington

Page 5: Joe Sincuk, Cold Spring Orchard, Belchertown

Page 7: Bob Cecchi, E. Cecchi Farms, Feeding Hills

Page 9: Our Family Farms milk, produced by local dairy farmer cooperative

Page 12: Liza Ashley, Dancing Bear Farm, Leyden

Page 15: Brent Was, Divine Gardens of Amethyst, Amherst

Page 18: Mary Lou Morawski, M & M's Green Valley Produce, South Deerfield

Page 19: Diane Roeder, Sojourner Sheep, Northampton

Page 23: Diemand family, Diemand Farm, Wendell

Page 25: Chip and Sherry Hager, Hager Bros. Farm, Colrain

Page 27: Ellen Prosser, Yenneveldt Farm, Montague

Page 28: Locally grown blueberries

Page 32: Cheryl Browning, Rocky Road Farm Highlanders, Wendell

Page 36: Locally grown asparagus

Page 67: Zawalick family, Zawalick's Sugar House, Northampton

Page 69: Phil Maddern, Gill Greenery, Gill

Page 70: Beth Cook, Cook Farm and Flavors of Cook Farm

Page 75: McCutchen family, Berkshire Sweet Gold Maple Farm, Heath

Page 79: Young woman in apple suit

Page 84: Bus ad; CISA's Fall Farm Tour and Feast, September 2001, Amherst

Page 86: Jaana Cutson models CISA T-shirt

Page 87: Barbara and Bill Hamilton, Hamilton Orchard, New Salem

Page 88: Anne Diemand, Diemand Farm, Wendell

Page 90: Chris Cavallari and Gary Golec, Serio's Market, Northampton



Locally grown raspberries

Page 94: Faye, Maxx and John Omasta, Hickory Dell Farm, Northampton

Page 96: Layne and Richard Lapinski, Lapinski Farm and Greenhouses, West Springfield

Page 99: Sylvija and John Pipiras, Bird Haven Blueberry Farm, Southampton

Page 100 (top to bottom): Duprey Family, Sunbrite Farm, Bernardston; Joe and Mary Ann Sullivan, Chester Hill Winery, Chester

Page 101 (top to bottom): Barbara and Bill Hamilton, Hamilton Orchard, New Salem; Gene Kosinski, Kosinski Farm and North Country Harvest, Westfield

Page 103: Ken and Holly Spatcher, Spatcher Farm, Leyden

Page 106: Hillman family, Hillman Farm, Colrain

Page 108: Duprey children, Sunbrite Farm, Bernardston

Page 112 (clockwise from top left): Jim Pitts, Delta Organic Farm, Amherst; Tim and Mary Nourse, Nourse Farms, Whately; Dave Nichols, Nichols Hilltown Dairy, Chesterfield; Scott Reed, Riverland Farm, Sunderland; Williams Family, Mapledge Jerseys, Shelburne

Page 115: Locally grown peppers

Page 125: Bud Foster, Foster's Supermarket, Greenfield

Page 126: Alan Harris, Noble Feast Catering, Shelburne

Page 127: State Representative Ellen Story, Amherst

Page 128: Food line, Campaign Kickoff

Page 129: Susan Gray, Mad Woman Farm, Amherst

Page 131: Gould Family, Gould Maple Farm, Shelburne

PHOTOGRAPHER CREDITS

Terri Cappucci: Cover (3), i, 23, 28, 36, 69, 88, 99, 100 (top), 108, 112 (all), 125, 126, 127, 128, Inside back cover
Mark Lattanzi: 79, 84 (bottom), 86, 90
Paul Shoul: 2, 5, 7, 12, 15, 18, 19, 25, 27, 32, 67, 70, 75, 87, 94, 96, 100 (bottom), 101 (2), 103, 106, 129, 131
CISA: Cover (1), 1, 9, 84 (top), 115

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