



Strategic Planning for Farmers Markets

EDSFORTH CONSULTING

Nonprofit Consulting for Progressive Change

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What We're Going to Cover

Four Central Questions

- **Why** do strategic planning?
- **Whose** responsibility is it to lead a strategic planning process?
- **What** are the steps in a strategic planning process?
- **How** do I get started?



Strategic Planning

What's the point?

**There is nothing as useless
as doing efficiently that
which should not be done
at all.**

- Peter Drucker



Do you need to do strategic planning?

Signs you might benefit from it

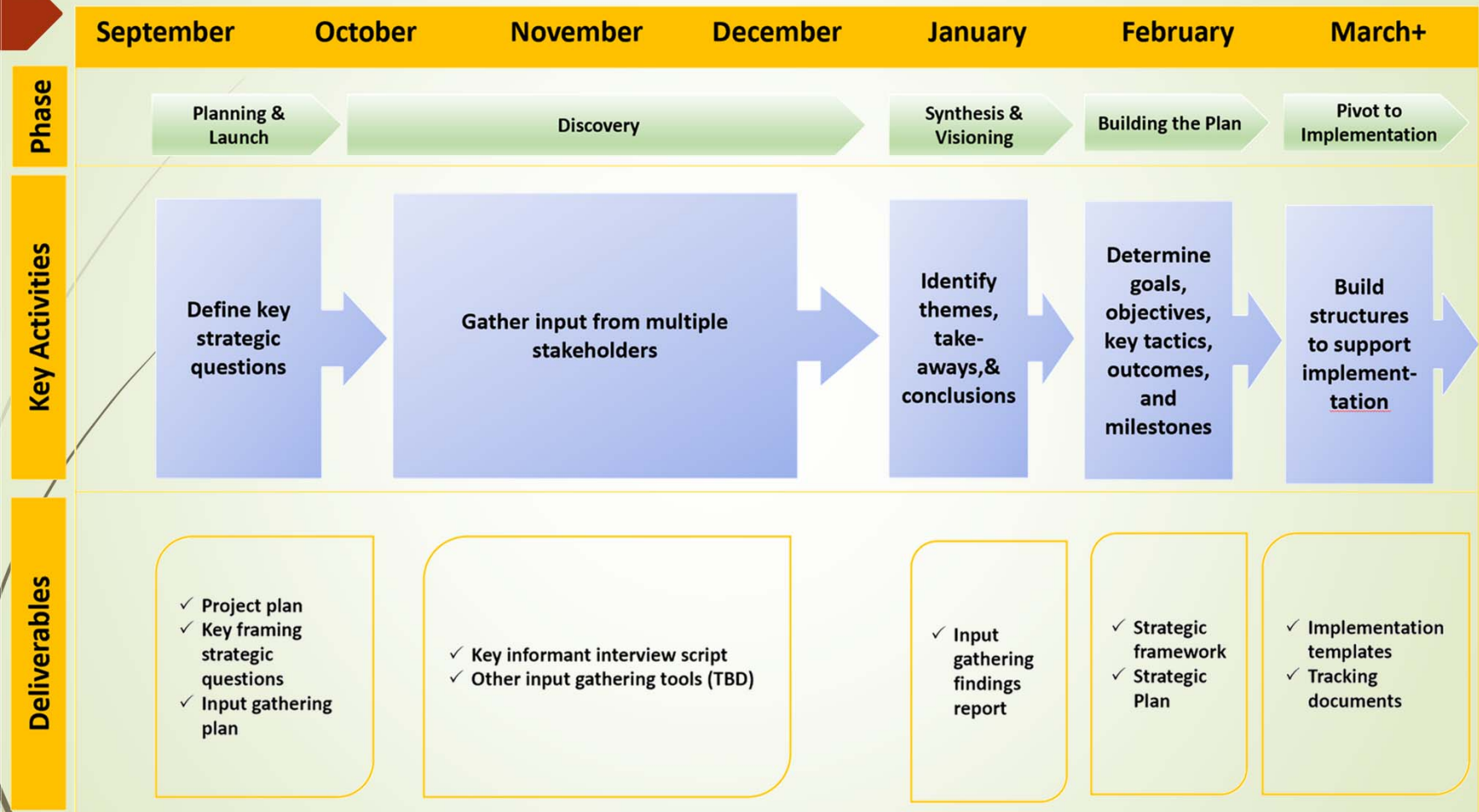
- ▶ **Big questions** about your future keep coming up at board and staff meetings.
- ▶ A **big opportunity or threat** has revealed itself and you need to figure out what to do about it
- ▶ You're **not sure you're prioritizing your efforts** in the smartest ways to achieve your mission.
- ▶ The organization is going in a million directions and needs to **get on the same page** and prioritize what the most important things are.
- ▶ **People keep asking** you what your goals are and you don't know how to answer the question
- ▶ There is **internal support and excitement** about plotting a multi-year course in the future



Roles and Responsibilities

Who does what?

- **Board:** Sponsors of the planning process, accountable for ensuring the organization has strategic goals and a process for achieving them.
- **Staff:** Partners with the board by providing key input to guide goal setting.
- **Strategic planning committee:** A combination of board, staff, and external stakeholders. 5 to 7 members is a good size. Often co-chaired by the Board Chair and the Executive Director.
- **External stakeholders:** Provide key input and perspective to guide goal setting. Includes farmers, vendors, market-goers, community leaders, funders, and regional leaders around food systems and food justice.
- **Facilitator:** Helpful to have a designated facilitator for your process, to keep people on task and working to deadline. Paid consultants are an option here, but not essential.





Planning Process Overview

Cascade Community Markets

- ▶ The process began by assembling a **committee of board members and staff**.
- ▶ We began **by identifying key strategic questions** to answer in the process.
- ▶ We spent 3 months **gathering input to gain insight into answering those questions**
- ▶ We then began to **synthesize the information gathered**
- ▶ This led to the emergence of **four main strategy pillars**, which we drilled down into with **specific prioritized efforts and activities**.
- ▶ Finally, we began building **key implementation plans** to address the strategy priorities



“Big Question” Defined

An opportunity, threat, or challenge to which you must respond

1. Offers an **opportunity** to do something new, or to take a thing currently done to a greater scale, e.g. a new program site becomes available in a new geographic area.
2. A **threat or barrier** to what you are doing now, with a negative impact on your organization, e.g. another organization or community program in your area decreasing the demand for your services.
3. A **challenge** to your operating model itself. This could be internal or external to the organization, e.g. a governmental or policy change negatively impacts your ability to run your organization or programs.



Big Questions in Practice

Cascade Community Markets

- ▶ Brainstorm generated 44+ questions
- ▶ Affinity mapping grouped these into three categories
 - ▶ Core mission, vision, and expansion questions
 - ▶ Community needs questions
 - ▶ Organizational structure and resource questions
- ▶ These questions and question groups became the foundation of our input gathering



Big Questions in Practice

Cascade Community Markets

Who do we exist for/serve: farmers, community, equal balance?

How do we build sustainable and healthful staffing and board roles?

Are we aiming to expand further – if yes, who do we aim to serve?

What resources are missing in our community?

How do we consider (or not) the tourist community as part of our core community?



Input Gathering

Some Typical Methods

Focus groups

- Small listening sessions
- Facilitated around a series of questions

Key informant interviews

- 1:1 listening sessions
- Interviewer asks a series of questions

Online surveys

- A way to gather input from large groups
- Offers confidentiality and/or anonymity

External data gathering

- Local and/or regional data sources related to your issue



Examples of Key Findings

Cascade Community Markets

Market awareness and marketing needs further attention

Affordability and value of shopping at the markets should remain a primary consideration

Events were of lower priority than the community connection

Farmers and vendors need the markets to remain lucrative above all else

Fundraising techniques require a re-evaluation

Service of minorities and marginalized people should be a primary focus of our programs and outreach

Tourism should be welcomed and invited

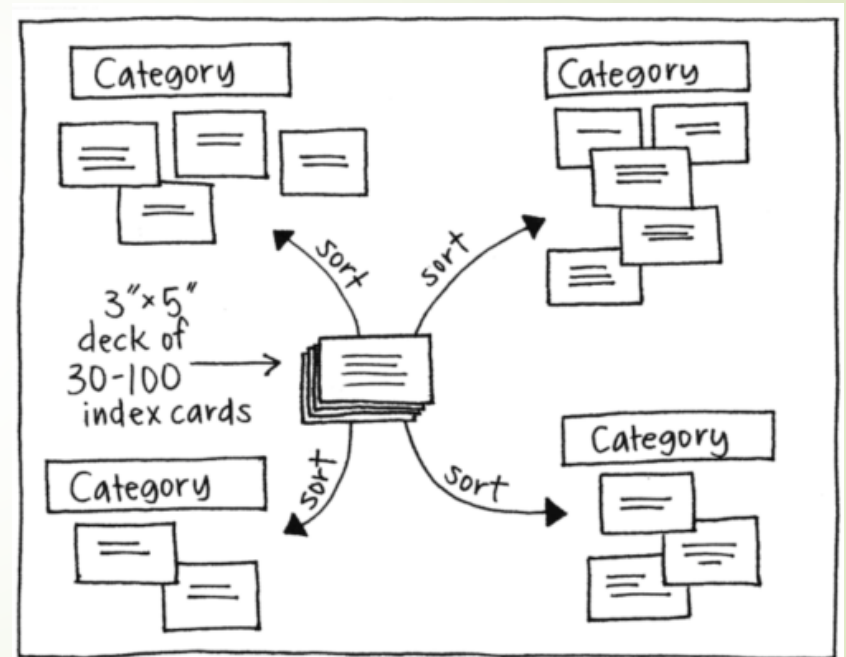
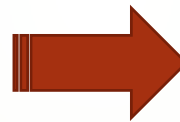
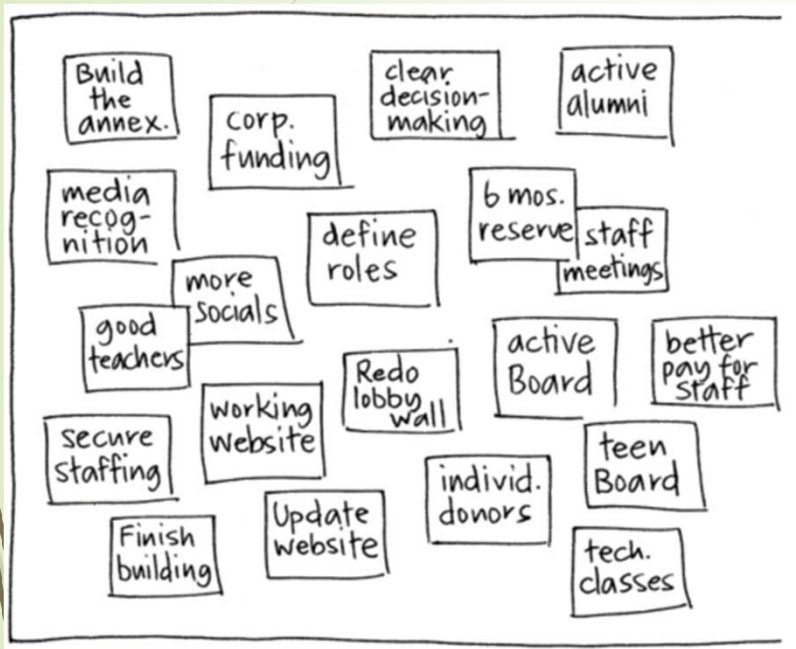
Synthesis and Visioning

Making Sense of What You're Understanding and Learning

I THINK YOU SHOULD BE MORE SPECIFIC HERE IN STEP TWO



Process for Sense-Making Affinity Mapping



Facilitation Exercise: Making Sense Together

Self-Reflection, Pairs, Small Group, Whole

ONE Reflect individually on what you're learning so far.
What stands out?
What's surprising?
What is taking shape?
Take notes if helpful.

TWO Share your thinking with a partner
Refine and build upon what you are understanding in the information being shared.

FOUR Two pairs gather and share their thinking.
Look for patterns and divergence.

ALL Each group shares observation with the whole.
Identify themes and main take-aways.
Facilitator records on flipchart or takes notes.

Strategic Planning Deliverables

Common documents by phase

Planning

- Project plan
- Big questions
- Input gathering plan

Discovery

- Survey and interview scripts
- Tracking documents
- Interview Reports
- Survey Reports

Synthesis

- Synthesized findings report

Building the Plan

- Strategic framework
- Strategic plan

Implementation

- Goals and activities worksheets
- Tracking documents
- Strategy screen

Cascade Community Markets

Prioritized Strategies and Goals



ONE

- Build and strengthen our organizational foundation



TWO

- Run great community markets



THREE

- Engage and support farmers for the long term



FOUR

- Engage, educate, and partner with local communities and economies

Strategic Planning Implementation

Mapping and Tracking Activities – an example

2022

- Formal transition to new org identity and multi-market structure
- Create new mission statement and values statements
- Relocate Cashmere Market
- Improve market attendance through increased marketing efforts
- Etc.

2023

- Add one to three new seats to the Board of Directors
- Create intentional fundraising and grant application plan
- Evaluate efficacy of marketing and communications tools
- Consider hiring for social media and/or outreach
- Etc.

2024

- Evaluate staffing and financial capacity to initiate new local food-access programs
- Implement, if possible, a new farm-sales program, such as Farm-to-School
- Finish translating all marketing materials into Spanish
- Etc.



START



Thank You!

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