

CSAs and OFN

This document describes use cases for 'CSAs' and perhaps other types of 'box programs' too.

We are trying to answer these questions:

Do we want the OFN app to meet the needs of food box users and CSAs (enterprises for whom subscriptions do not work currently), and if so, what wishlist items do we need? If not – can we offer these enterprises anything else? Is integration with other csa software an option?

Is it possible to offer the need features as 'funded features' to CSAs and box programs who might be willing to purchase this development – potentially by adding on a 'new development fee' to their share prices in 2022?

If we don't think there are enough use cases like these to support new feature development, is there a way we can mutualize things like scripts, zaps, dynamic spreadsheets... to support these users?

Please contribute any thoughts and additions to this document!!!!

What is a CSA?

'Community Supported Agriculture' is a sales approach that originated in North America, in the mid 1980s. (A similar approach called Teikei originated in Japan around the same time.)

In a CSA the 'customer' (CSA's call them 'members' or 'shareholders'), buys a 'share' of the farm's harvest **in advance**. Then, on a given schedule (usually weekly), the member receives or picks up their share of what is harvested. The basic idea is that a community builds around the farm, and this community agrees to share the risk the farmer takes. So, if the weather is rainy and there are no tomatoes, the member does not get tomatoes. If it's a good year for potatoes - then the member gets lots of potatoes.....

In the original model - the member pays for the entire season in advance. But in recent years as share costs have increased, it is more likely that the member pays the farmer in several installments.

In the original model - the farmer decides what goes into the share each week (**'farmer choice'**). But in recent years, many CSAs let members make some, or all, of the choices each week (**'member choice'**).

In the original model – everything the farm harvested was divided among members. But today, the farmer puts what they consider a fair value of products in the share, and often sells anything extra to the general public, or to wholesale buyers like restaurants. The farmer often opens these sales to members

also to buy in 'extras' or 'add ins' to their share. *(This means the member needs to know what is coming in their share, so they can decide what add ins to buy.)*

Despite these changes, the ethos of building a community around the producer remains. In North America CSAs are very quick to explain that they are NOT a 'food box' program because of this community risk-sharing element.

CSA Models/Use Cases and the OFN APP

There are really dozens of CSA models --- but for our purpose we can classify them into 4 types:

Farmer Choice CSAs (the farmer decides what the member gets each week)

- a) **Farmer Choice with no add ins** (no member/customer choices - no additional items to buy are available)
- b) **Farmer Choice with add is** (members have the option to buy additional items weekly)

Member Choice CSAs (members make weekly choices from a list of options)

- a) **Member Choice with no add ins** (members make 'pre-purchased' choices, but no additional items to buy are available)
- b) **Member Choice with add ins** (member makes their 'pre-purchased' choices, but can also buy additional items weekly)

These are shown below with some thoughts on how OFN works (or not) today for these 4 models. Red indicates the area where we do not have functionality.

	Does the farm sell additional items (besides the CSA)?	
Who Chooses what goes in the share/box?	'Add ins' (customers can purchase additional items weekly)	'No add ins' (no weekly offering of additional items)
Farmer Choice	Farmer sells season shares in a shop (see below) and builds a customer list. Customer list is exported to Mailchimp for ongoing member communications Weekly shop - Tagging if needed (discounts for members, variants only members see....) Farmer emails customers their share contents, or hyperlink to a weekly list in their shop home page	Farmer sells season shares in a shop (see below) and builds a customer list Customer list is exported to Mailchimp for ongoing member communications No need for a weekly shop No pick/pack lists are generated No packing slip to include in shares No ability to track product sales year by year

	Pick/pack lists include only 'add ins' – not share contents Reports do not accurately reflect all products sold and can't be used to track product sales year by year No packing slip generated - the OFN invoice can be sent/printed but it only includes the 'add ins'	
Member Choice	Farmer sells season shares in a shop (see below) and builds a customer list Customer list is exported to Mailchimp for ongoing member communications Farmer sets up a weekly shop Tag customers by share type (ie 'large share – 25 choices', 'medium share – 15 choices..') Farmer creates duplicate variants (see below) in inventory for the product choices members will make that week and tags the share types to these products (SO only the choices for my share type show to me in the shop) Complete pick/pack lists are generated Reports can be used to track product sales Invoices can be sent or placed in shares as a 'packing list'	Farmer sells season shares in a shop (see below) and builds a customer list Customer list is exported to Mailchimp for ongoing member communications Farmer sets up a weekly shop Tag customers by share type (ie 'large share – 25 choices', 'medium share – 15 choices..') Farmer creates variants in inventory for the product choices members will make that week and tags the share types to these products (SO only the choices for my share type show to me in the shop) Complete pick/pack lists are generated Reports can be used to track product sales Invoices can be sent or placed in shares as a 'packing list'

Ironically it is the 'Farmer Choice' CSAs that we don't serve well, and these are the largest CSAs which represent the greatest revenue potential for OFN. Typically these are 100 – 200 share CSAs, and share costs average \$800/member.

Why do you have to duplicate variants?

The shop needs to present the choices that the member will make AND the add-ins available to the public (and including the member) to purchase. The add-in has a cost attached to it, but the product for the share choice has been pre-purchased so it is priced at \$0. **This isn't perfect because a member might ignore their instructions and choose too many or too few products. But right now – it's the best we've got I think. The farmer might 'over rule' the member choices at packing time – and this would be conveyed in terms and conditions that the member must accept when they purchase their share.** Below is a typical 'member choice' shop front. Different combinations of choices would be tagged for

different share types. The member makes their choices and then buys in any 'add ins'. Everything is on a pick/pack list.

SHOPS

MAP

PRODUCERS

MARKETS

ABOUT

DONATE

Engli



from [Demo - CSA](#)

organically grown

local

Food Safety Certification

Yes I want potatoes

5 lbs

\$0.00

\$0.00

?

\$0.00 / bag

Add



Summer Squash - Choose 2 of the following

from [Demo - CSA](#)

organically grown

local

Food Safety Certification

Large Zucchini

1 large

\$0.00

\$0.00

?

\$0.00 / item

Add

Patty Pan Squash

1 bag

\$0.00

\$0.00

?

\$0.00 / item

Add

Small Zucchini

3 small

\$0.00

\$0.00

?

\$0.00 / item

Add



Tomatoes, Peppers, Eggplants - Choose 3 of the following

from [Demo - CSA](#)

organically grown

local

Food Safety Certification

Cherry Tomatoes - Mixed

1 pint

\$0.00

\$0.00

?

\$0.00 / item

Add

Green Peppers

1 pepper

\$0.00

\$0.00

?

\$0.00 / item

Add

Slicing Tomatoes

3 tomatoes

\$0.00

\$0.00

?

\$0.00 / item

Add

Thai Eggplant

2 eggplants

\$0.00

\$0.00

?

\$0.00 / item

Add



Brussels Sprouts

from [Demo - CSA](#)

organic (certified)

organically grown

local

Food Safety Certification

1 basket

\$6.00

\$0.00

?

\$6.00 / basket

Add

Other solutions I've eliminated:

List all items in the shop just as they are in the product list, and then apply a discount equal to the prorated amount of the member's pre-purchased share for that week. It could work for some CSAs – but not most. Most CSAs that give members choices, limit those choices in some way - either by category (as shown in the shop pic above) or by a point system (which OFN can't support at all).

If a CSA was thinking of the choices as basically just a dollar amount, then it is easier for them to use the existing recurring/standing order (subscriptions) feature in OFN...

Selling the Shares - Installment Payments

The CSAs we've talked with are aware of the OFN subscriptions feature. They reject it because it's a 'pay as you go' way of buying. The buyer can cancel at any time. The crux of the CSA model is a season-long agreement with the member. The member needs to commit to a season-long purchase, and pay for this either up front, or by installments.

This is a way to hack this today:

Farmer sets up an order to sell shares (In practice they likely set up an order cycle for each different delivery region/pick up location – because this lets them access a weekly delivery report by pickup location). They give their current year members an early opportunity to sign up, and then they promote it to the public.

So if, for example - a member buys a 'full share' at \$1000. Their order total and amount owing is \$1000. We need to them to pay a deposit when they order and then pay installments at pre-defined dates.

Cash payment methods are no problem - as a partial payment can be entered, and the order shows balance owing. The farmer acknowledges the initial payment, sets up an installment schedule, sends reminders when payments are due and reconciles the payments in OFN.

Automated credit card payment can be offered - but only if the customer is paying the full amount up front, as partial credit card payments are not possible in OFN today.

Installment payments on credit can be offered – but this is set up as a non-automated method (not connected to the stripe account). Then, payments are made through the stripe dashboard and reconciled in OFN (entered as a payment on the order using a 'back end only' payment method).

So typical payment methods presented at checkout would be:

Bank Transfer – full amount (this is a cash method in Canada)

Bank Transfer Installments – send xx deposit today, and **we will remind you** for 2 more installments

Credit Card - full amount (this is the only automated payment method)

Credit Card Installments - save your card to the shop **and we'll process a xxx deposit today and future installments on July... and August....**

So basically - it's a manual system. For a 50 share CSA - it works. But if you have 200 shares - it takes considerable time to process installment payments.

Set up a recurring payment order (OFN subscription)?

We have one food box program on OFN-CAN that does this today:

Take the original share order - but **order total is only for a down payment**. (Customer has no amount owing at this point).

Manually workout an installment plan with equal remaining payments for each 'share type'

Create 'payment products' for the amounts needed.

Create recurring orders (OFN subscriptions) for these.

Advantages

Member's payments are made automatically and this runs in the 'background'.

Disadvantages:

Very time consuming to set up for a 100 or 200 share CSA **(If we could create batch orders for a tagged group for example, this would be a solution)**

The total amount owing for a season-long share is never on the customer's account. So there is no evidence of a contract between the buyer and seller.

Summary - So where does this leave us?

Improve Installment Payments?

We have a wishlist item to enable debits on cards stored with OFN enterprises, and this could solve the installment payment challenge - <https://github.com/openfoodfoundation/wishlist/issues/82>

In the meantime, we have a hacky way to take installment payments on an original order with an 'amount owing' - we could add functionality to simplify that: There is a wishlist item for OFN invoices to include 'how to pay' information with a stripe link - this would also make partial payments much easier - <https://github.com/openfoodfoundation/wishlist/issues/96>

Will the new inception of codes and discounts help us? (Honestly, I'm still trying to figure this out...)We

Ability for users to get farmer choices onto pick/pack lists?

We have a wishlist item for a 'box builder' where users can assign products into a composite product - <https://github.com/openfoodfoundation/wishlist/issues/117> But we've had this wishlist item since 2016 – so its not likely to happen soon. And even if it did, it doesn't solve the farmer choice CSA, where the members do not place orders weekly.

It could be that **spreadsheet integrations, like** being planned by OFN-AUS is our best way forward for 'farmer choice' CSAs. Something like: farmer has their share products for each week on a spreadsheet that can play nicely with our OC customer totals report, or packing lists. Farmer can run these reports, and then integrate in the share products -- and this will give them a full pick list, and a packing list by customer. Could it include the customer balance owing too? (Heaven)

Ability to communicate share contents easily to members?

CSAs have extensive communications with customers - more than most OFN users I think. Since OFN does not do these in-app communications, this will always be a downside for us. Can we make it easier for the CSA/food box user to link with mailchimp, group text messaging...? For example – can tags made in the OFN customer list be included in the CSV customer list download, so users don't have to create tags in both places (the OFN app and the mailing program?)

Noting that we have a wishlist for whitelabelling enterprise emails to customers that could accomplish some of what is needed for CSAs, but we would need the added ability to tag customers who receive various emails -- <https://github.com/openfoodfoundation/wishlist/issues/96>

Let's work together to figure this out!!!!!!