

# IOWA

## Local Food Organizational Toolkit

STRUCTURE ■ MANAGEMENT ■ FINANCE

Part 1: Defining your organization's focus and leadership



IOWA STATE UNIVERSITY  
Extension and Outreach



LEOPOLD CENTER

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## Introduction

The purpose of this toolkit is to lay out the business and financial elements of starting and coordinating a local foods organization in Iowa. The information in this toolkit is applicable to farmers markets, advocacy groups (i.e., Food Access and Health Work Group, Iowa Farmers Union), coalitions and multi-stakeholder groups (i.e., Regional Food Systems Working Group, Flavors of Northwest Iowa, Northeast Iowa Food and Fitness Initiative), food hubs, educational and civic groups, food policy councils, farmer cooperatives, and others.

This is **Part One** of a toolkit which is divided into three parts: 1) Defining your organization's focus and leadership, 2) Organizational structure, and 3) Funding your local food organization. Although each section can be read independently, we strongly encourage you to review all three sections together. You will also find worksheets, references and examples to help you move each idea from concept to action.

Ongoing business or organizational management, food safety and health regulation, insurance, or marketing will not be covered in this toolkit. However, other resources on these topics are available at the Iowa State University Extension and Outreach Food Safety website <http://www.extension.iastate.edu/foodsafety/>, the Legal Guide For Direct Farm Marketing by the Drake Agricultural Law Center\_ <http://directmarketersforum.org/the-legal-guide-for-direct-farm-marketing/>, and the Iowa Department of Inspections and Appeals Food and Consumer Safety Bureau <http://dia.iowa.gov/page3.html>.

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## Defining the Organization

This section provides general guidance for crafting mission and vision statements, determining how to engage stakeholders, and developing a strategic plan for a local food organization. This section may be most useful for nonprofits, cooperatives or values-based corporations that are democratically controlled by a board of directors. However, any community-oriented business or organization stands to benefit from having a well-articulated mission statement or method of reaching out more effectively to stakeholders. “Supporting Local Food System Development in Your Community” is a similar guide and geared specifically toward starting a local food coalition. <https://store.extension.iastate.edu/Product/Supporting-Local-Food-System-Development-in-Your-Community-pdf>.

### Core Values, Mission and Vision

No organization or business can operate effectively without values or a mission and vision that is shared by all of its owners or board members. Good mission and vision statements serve as a bright lighthouse that will be looked to for guidance again and again as the organization makes decisions aligned with its purposes. These core guiding principles are also part of the face that your organization presents to the public.

To make sure values and vision are honored and reflected in the mission statement, it is important to have an in-depth, transparent discussion about them with the group’s leadership early in the life of the organization. They should be written down and included in any official information about the organization, such as brochures, grant proposals, and press releases. The organization should be guided by its mission and refer often to its values and vision so that project decisions consistently advance the same purposes. Mission and vision statements can always be changed as the organization evolves, but changes should be made with the consent of the group’s leadership and stakeholders.

People who favor concrete, hands-on projects sometimes find the process of writing mission and vision statements rather tiresome. In this toolkit you’ll find tips and worksheets to help you accomplish the task quickly and smoothly while including multiple voices in the process. In the long run, your community, funders, and supporters will thank you for providing a clear and consistent message about the purpose of your organization. And if your group is pressured to go in a different direction, you may be glad you took the time to hammer out that original core statement of purpose.

### Core Values: Who are we?

Start by brainstorming the following questions within your organization:

- What values are so essential to our work that they are core to our identity?
- Which values will be reflected in every decision, action, and communication about our work?
- If values are the DNA of collective work, what is our DNA?
- What implications will activities have for our core values?

Answering these questions will help your organization develop mission and vision statements.<sup>1</sup>

### Writing a mission statement

The mission statement is a one-sentence statement describing the reason your organization or business exists. It will be used to guide decisions about actions and priorities, and should help the public understand your purpose. It should be clear, memorable, and concise. You are likely to use and share it more often than your vision statement. Here are examples of mission statements from local food organizations in Iowa. **What do you like about each mission statement? What could be improved?**

**Eat Greater Des Moines:** *“Identify, develop and connect resources with the broader community to support the entire food lifecycle in central Iowa.”*

**FoodCorps:** *“Together with communities, FoodCorps serves to connect kids to healthy food in school.”*

**Iowa Food System’s Council Food Access and Health Work Group:** *“A vibrant statewide network of food and nutrition assistance program administrators, emergency food system providers, public health professionals, community-based organizers and food system stakeholders focused on cultivating a diverse and just food system that eliminates hunger, increases access to nutritious food, and improves the health of all Iowans.”*

Additional examples of mission statements from other organizations can be found at [Topnonprofits.com](http://topnonprofits.com/?s=mission+statements).

Mission statements often are organized in the format, “Our mission is to...x, y and z.” In writing your statement, think about the three most important functions that your organization or business serves in the community. It should be short, simple and ideally

25 words or less. If your organization will be guided by members of the community, writing your mission statement should be a process in which your key stakeholders can participate. Brian Perry, community development specialist for ISU Extension and Outreach, recommends the easy five-step process to write a mission statement found at [Bplans.com](http://articles.bplans.com/writing-a-mission-statement/). <http://articles.bplans.com/writing-a-mission-statement/>. Additionally, Appendix A suggests a group activity that can be used to develop a mission statement for your local food organization.

## Writing a vision statement

While the mission statement explains why your organization exists and what it does, the vision statement describes the long-term difference that you wish to make in the world. Writing a vision statement involves imagining what the future would look like if your efforts were successful. Two different organizations may have the same vision for the future, but different missions or ways of getting there. For example, if you run a farmers market, both your organization and the local FFA program may have the vision of building a thriving farm economy in your county, but FFA's mission may be to train young farmers while your organization's mission may be to create sales opportunities for those farmers. As explained in "The Vision Statement" at [BoardSource.org](http://BoardSource.org), "With a reachable goal—however far the goal lies in the future—the vision statement is motivational and hopeful. For instance, it's unrealistic—no matter how noble these visions are, for one organization to expect to eradicate poverty in the world or make criminality disappear." Note these examples of vision statements from [BoardSource.org](http://BoardSource.org):

*Soup kitchen: No child in our city will go hungry to bed in the evening.*

*Literacy program: In two decades our services will no longer be needed.*

*Symphony orchestra: We will be recognized as the best symphony in America.*

As with the mission statement, choosing a vision should be a process in which your key stakeholders participate. Here are some examples of recommendations for a visioning exercise:

"Develop a worksheet with a list of key questions to elicit values, desired future state, challenges, and unique features of the organization from your participants (see resources that follow for guidance on key questions). When working with a large group of people, break into small groups.

Once each group has answered the questions and shared them with the larger group, have the entire large group craft a vision statement together that embodies these answers. After drafting your vision statement, test it against the list above which outlines the key components of a vision statement." —University of Wisconsin-Extension

"Present small group(s) with a scenario such as: 'Imagine that it's the year 2017. As you are traveling to your service site, you see a newsstand with the latest copies of your favorite magazines. Then, on the cover of one, you notice a big headline about your organization. Now, your job as a group is to create that 'cover story.'" —Idealist on Campus

Many examples and resources are available from the board development websites listed in the "Building a Board of Directors" section of this toolkit. An example of a mission and visioning process is provided in Appendix A.

## Analyzing Stakeholders and Learning the Local Food Landscape

The most enduring local food organizations are ones that have help and support from their broader communities. Researchers in a paper investigating the success of the Northeast Iowa Food and Fitness Initiative wrote, "Participation of individual community members in a process of relationship building, community planning, decision-making and action are key to successful social change work."<sup>2</sup> Likewise, Eat Greater Des Moines found that having support from their broader community allowed them to become an information and resource connection point. "We are seen as the coordinator/collaborator for local food systems and are able to connect others who may not have met yet, but need to," said Linda Gobberdiel, Eat Greater Des Moines food systems coordinator.

The first step to gain community support is getting to know the local foods work that is currently being done in your community and the people who have a stake, or could have a stake, in the success of the work. A **stakeholder** is a person or organization who is likely to be *impacted by* your organization, and/or someone who *has impact on* your organization's efforts. The impacts on either end may be positive or negative. An ounce of reaching out and engaging stakeholders at the outset is worth a pound of trying to include them later, especially if they feel they've been excluded. This can be particularly true of farmers and local public officials.

To identify stakeholders, begin by collecting information about the scope of your community's current local food system. This will help you determine what has already been accomplished and what efforts are underway. You may want to answer the following questions:

- Are there other people or organizations already working on the development of my community's local food system?
  - If you don't know where to start, contact your local chamber of commerce, resource conservation and development council, or your extension and outreach office.
  - Is there a demand for local food? If so, how is that demand currently being met?
- Are producers in my community already selling directly? Which producers? Where are they located?
  - Do grocery stores in my community sell locally-grown produce?
  - Do schools, hospitals, or nursing homes source any cafeteria or dining service items locally?

Next, map the potential benefits of local food work for the different stakeholders in your community. Brainstorm ways in which your organization's local food work could improve the local economy, environment, social relationships, health, education and infrastructure. For example, if your school district sources ten percent of its vegetables locally, producers will increase their market opportunities and children in school lunch programs would have access to fresh, locally grown produce.

Finally, acknowledge community assets you could call upon in your organization's local food work to achieve benefits that were previously identified. Potential assets include fertile soil, community pride, a strong community foundation, creative youth, active nonprofits, and entrepreneurial business owners. Who is responsible for those assets and how can you work with them?

Keeping these assets in mind, the next step is to conduct a more formal stakeholder analysis of your organization's local food work. The goal of a stakeholder analysis is to develop cooperation between your organization and its stakeholders, which ultimately will be necessary for it to succeed. Stakeholder analysis can be done when an organization is first being formed, but it also is helpful when you need to think about the consequences of a particular

decision for the members of your community. The analysis will help you to identify all stakeholders, consider what they want from you, understand why their individual needs or demands might be important, and develop your goals in a way that takes them into consideration. Instructions for one type of stakeholder analysis are included in Appendix B.

According to Kelly Nix, West Virginia University Extension, stakeholder analysis involves identifying the following people:

- **Primary stakeholders:** Those who are directly impacted by the actions of your organization, including partner organizations, farmers, migrant laborers, customers, business owners, students, community leaders, children receiving free or reduced-price lunches.
- **Secondary stakeholders:** Those who are indirectly affected by the actions of your organization. These might include intermediaries who serve your primary stakeholders, for example, local governments, FFA teachers, extension offices, schools.
- **Key stakeholders:** Those who have major influence on the success of your organization. Key stakeholders can be individuals and some may be primary or secondary stakeholders as well.

Possible local food organization stakeholders include:

- Farmers
- Local businesses
- Consumers, including dedicated local food shoppers, needy families, and kids
- County and municipal elected officials
- Local nonprofits and service-based organizations
- ISU Extension and Outreach
- Health advocates, including clinics, nutrition educators, and local department of health and human resources offices
- County health department staff
- Schools and colleges
- Faith communities, including churches and food pantries
- Institutional buyers, including hospitals, colleges, and prisons
- Grocery stores

Once you know who your stakeholders are, identify the benefits they can provide to the community.

Roles for stakeholders, depending on their skills and interests, might include:

- Helping to write the mission/vision statements and forming the organization;
- Having a say in major governance decisions, such as selling rules and location for a farmers market or food hub;
- Serving as ex officio or non-voting members of the board of directors;
- Serving on an advisory committee;
- Providing business strategy advice;
- Donating to the organization;
- Helping with fundraising;
- Organizing events and activities;
- Filing paperwork for the organization, such as nonprofit or business incorporation;
- Becoming a “Friend of [Name of Group] by donating regularly in return for special incentives, such as merchandise or events;
- Managing the organization or being part of a small group management team;
- Volunteering to help with day-to-day activities.

Think about what stakeholders can do to help your organization now, and how you might engage them more directly in the long term. Ensure that underrepresented groups such as women, immigrants, limited resource families, farmers, and youth feel welcome. Encourage people to participate where they feel comfortable and where their skills can best help you serve the community. As mutual trust builds between the organization and its stakeholders, it will gradually become more appropriate for some stakeholders to assume larger responsibilities or to partner with you more substantially.

Let’s take the example of a farmers market. People who are personally invested in the success of the market and understand its daily operations, such as vendors, should be somehow involved in its governance or decision-making. If some of your supporters have special skills such as legal or business expertise or good connections with public and private donors, but don’t know much about farmers and markets, they might make good members of an advisory group. Consumers who know very little about market operations, but want to help, could donate to a “Friends of the Market” fundraising drive or be invited to volunteer for simple tasks like counting customers. Make sure that the people who have a say in the core governance

and operations of the market, such as board members, are trusted individuals who genuinely understand its mission and feel personally invested in its success.

## Coalition Building and Collective Impact

If your organization is bringing a group of people and organizations together to solve a complex social problem, you may be interested in “Collective Impact.” Kania and Kramer coined the phrase in their 2011 Stanford Social Innovation Review article suggesting that to create lasting solutions for social problems on a large scale, organizations need to coordinate their efforts and work together around a clearly defined goal. Listed below are their five conditions of collective impact success:<sup>3</sup>

1. A common agenda
2. Shared measurement
3. Mutually reinforcing activities
4. Continuous communications
5. Backbone support

Although collective impact methodology is generally used by multi-organization partnerships, some strategies may apply to local food organizations and businesses. Learn more about this methodology on the Collective Impact Forum website. <http://collectiveimpactforum.org/>.

For those working to build a local food coalition, Lynn Heuss, ISU Extension and Outreach, suggests engaging coalition members on one of three levels, with varying degrees of time commitment:

- **Backbone partners** provide a firm commitment to the general structure and management of the coalition, either financially or by providing in-kind support such as staff time, office space or equipment. They have some ‘skin in the game,’ in that they directly contribute to and benefit from the coalition’s work. Backbone partners can include local ISU Extension and Outreach county offices, academic institutions, farmer organizations, public health agencies, or local government.
- **Secondary partners** are invested in projects or programs of the coalition, but have less involvement in the day-to-day management, accountability and sustainability of the coalition entity itself. They may contribute to the overall mission and strategic plan, and share in receiving recognition for the coalition’s successes.

- **Supporters** have limited time to invest in the coalition's own activities, but significant interest in a vibrant local food system. Supporters might include local business owners, public officials, and ordinary consumers. They may choose to participate by attending events, reading newsletters, making donations, attending lobby days, or patronizing local food businesses. Some supporters may ultimately become involved in a more substantive way.

## Goal-Setting and Strategic Plans

Strategic planning is the process of defining a group's strategy or direction. Together with the mission and vision, the strategic plan helps guide what the organization is, what it does, and why it does it. In a more immediate sense, the strategic plan governs how resources are allocated and which items end up on the organization's agenda for the coming year.

Lynn Heuss, ISU Extension and Outreach, and Kelly Nix and Norm Schwertfeger, West Virginia University Extension Service, agree that strategic planning is important because it:

- Is an opportunity for consensus decision-making;
- Is an opportunity to brainstorm;
- Contributes to the development of a core group committed to the success of the organization;
- Helps clearly define your purpose;
- Provides a measurable plan with a beginning, a middle and an end;
- Develops a sense of ownership of the plan/ organization;
- Provides a base from which progress can be measured;
- Provides clear focus for the organization.

For more ideas about developing a strategic plan for a local food coalition, see Supporting Local Food System Development in Your Community <http://www.leopold.iastate.edu/pubs-and-papers/2015-01-supporting-local-food-system-development-your-community/>. Whether they are new or old, organizations should revisit their goals, strategic direction, and implementation plans at least once a year. For groups with many farmer stakeholders, late fall is an ideal time to start such a discussion, when the past season is still fresh on everyone's mind, but after they have had a few weeks to recover from the growing season. Setting goals, laying out possible tasks for the following year, and then revisiting the draft plan early in the new year

gives everyone plenty of time to consider what should happen next.

As with the mission and vision, an organization's strategic plan should be developed with the core leadership of the group, usually its board of directors, and possibly some advisors. A very basic version of the strategic planning process involves:

1. Scanning the environment, revisiting old goals and assessing the health of the organization;
2. Envisioning the future direction of the organization;
3. Updating goals;
4. Making an implementation plan to achieve those goals.

This usually requires at least one long, focused meeting that could take anywhere from three hours to two days. The pain can be eased by calling this long meeting a "retreat," and holding it in a nice setting, providing lengthy breaks, and serving good local food.

### Strategic Planning Process - detailed example:

The board of directors decides who will be invited to the strategic planning meeting. Possible attendees include board members, the organization's staff manager, and one or two trusted advisors who will sit in on the meeting.

1. At the retreat, review the mission statement, vision, and previous year's goals. The board president or a staff manager gives a quick report on the year's accomplishments, including progress made toward any goals that had been set.
2. Conduct a visioning exercise to determine future changes based on the previous year's performance. Encourage the group to dream big! A good question to prompt this is, "In an ideal world, what does this organization look like in ten years?" These suggestions can be listed rather than written in a formal vision statement. In compiling the list it may be helpful to ask everyone to write their ideas down separately, then share their thoughts one at a time. Ensure everyone's voice is heard and take note of which topics come up frequently.
3. Complete a Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis (Appendix C) to gauge how everyone thinks the organization is doing, along with existing possibilities and issues. A Stakeholder Analysis (Appendix B) also could be done at this point.

- Brainstorm and agree on goals for the upcoming year. Goals should be set in reference to the vision they have for the organization and the strengths, weaknesses, opportunities and threats they identified for their organization. In setting goals, they might look at each of the aspects of the operations listed in the strategic planning framework in Appendix D. Goals should be clear, realistic and achievable. No more than three to five big goals should be set for any one year. Note the following examples of appropriate sets of goals:

### For a farmers market:

*This year, our market will...*

- Increase vendor sales by an additional twenty-five percent;
- Become an approved Supplemental Nutrition Assistance Program (SNAP) acceptor;
- Enlarge our vendor pool by recruiting at least two more vendors;
- Raise enough money to purchase pop-up tents for all vendors.

### For a regional food coalition:

*This year, our local food coalition goals will be...*

Goal 1. Create a regional food directory;

Goal 2. Host a local food conference;

Goal 3. Launch a farm to school program in six targeted pilot schools;

Goal 4. Conduct a feasibility study for a food hub.

Transition to planning mode by having board members break into small groups or committees to study an identified goal assigned to each group and filling in the list in Appendix D. Each group should propose tasks, responsibilities, and a timeline for its goal, as well as a means of determining how well the goal has been achieved. Using one of the regional food coalition goals above, here is an example of a well-defined goal:

*Goal 2: Host a local food conference*

*Plan:*

- Reach out to economic development office, chamber of commerce, regional tourism board, and local media for local business support. *Joe and Nalini will list potential partners, reach out and report.*

- Create a committee to support the event and all details. *Steve will coordinate.*
- Develop a work plan, schedule, budget and timeline for event that committee can work from. *Steve will coordinate, Laura will assist.*
- Scope out potential locations for the event. *Victoria will reach out and list options.*
- Find support for marketing material. *Rashawn will coordinate.*

- Reconvene to discuss and amend the small groups' proposals for each section of the strategic plan.

Adjourn and send out the draft plan to everyone following the meeting. Some committees may have additional work to do to refine sections of the plan.

Following the retreat, share revisions with the group. At the next meeting, the board formally votes to adopt the revised strategic plan.

Goals and tasks of the plan are revisited at each subsequent board meeting, and progress reports are given by the committees or people responsible.

During the strategic planning process, or any in-depth group discussion, it can be useful to adopt some ground rules to help people stay engaged and respectful with each other. These can be presented at the beginning of a meeting, modified by the attendees as needed, and adopted by consensus before the real discussion starts. When a discussion requires a group brainstorm, such as for a SWOT analysis or visioning activity, it also may be useful to offer brainstorming guidelines that encourage creative thinking. Be sure to post guidelines and ground rules in a visible place during the meeting.

Here are some examples from Facilitation Training for Community and Economic Development Educators at Iowa State University:



### Ground Rules for Discussion

- Do not interrupt the speaker
- Speak in sentences
- Everybody can/should participate
- All opinions are respected
- Speak in “I” statements
- Civil language

### Guidelines for Brainstorming

- Don’t critique ideas
- Use freewheeling imagination
- Build on others’ ideas
- Aim for quality
- Record each idea

## Facilitation

Sometimes, a third party facilitator, someone who cares about your mission but is not directly involved in it, can greatly aid the strategic planning process.

Local foundations, extension offices or nonprofits may provide free strategic planning and facilitation assistance. Paid consultants can assist with strategic planning, but their services may be more appropriate for an organization that has staff, a sizeable budget, and many decisions to make.

The following are ISU Extension and Outreach facilitators who have experience in facilitating local food organizations and are available to help:

Community and Economic Development Specialists:

Abbie Gaffey  
712-539-1169  
[agaffey@iastate.edu](mailto:agaffey@iastate.edu)

Jane Goeken  
712-240-2504  
[jngoeken@iastate.edu](mailto:jngoeken@iastate.edu)

Jon Wolseth  
515-231-6513  
[jwolseth@iastate.edu](mailto:jwolseth@iastate.edu)

Local Foods Team Program Assistant

Lynn Heuss  
515-201-9405  
[leheuss@iastate.edu](mailto:leheuss@iastate.edu)

## Building a Board of Directors

For-profit corporations, nonprofit corporations, cooperatives and associations are required to have a board of directors. The board assumes legal and ethical responsibility for the actions of the organization. It

provides oversight of the activities of the organization and its staff to ensure goals are met and ethical standards are followed.

## Major Duties of a Board of Directors

“In Boards We Trust”, author Brenda Hanlon suggests the following duties for boards of directors. The text was modified by author Carter MacNamara to apply to both nonprofits and for-profits:<sup>4</sup>

1. Provide continuity for the organization by setting up a corporation or legal existence, and to represent the organization’s point of view through interpretation of its products and services, and advocacy for them.
2. Select and appoint a chief executive to whom responsibility for the administration of the organization is delegated, including:
  - a. Review and evaluate his/her performance regularly on the basis of a specific job description, including executive relations with the board, leadership in the organization, in product/service/program planning and implementation, and in management of the organization and its personnel.
  - b. Offer administrative guidance and determine whether to retain or dismiss the executive.
3. Govern the organization by broad policies and objectives, formulated and agreed upon by the chief executive and employees, including assigning priorities and ensuring the organization’s capacity to carry out products/services/programs by continuous review of its work.
4. Acquire sufficient resources for the organization’s operations and to finance the products/services/programs adequately.
5. Account to the stockholders (in the case of a for-profit) or public (in the case of a nonprofit) for the products and services of the organization and expenditures of its funds, including:

- a. provide for fiscal accountability, approve the budget, and formulate policies related to contracts from public or private resources
- b. accept responsibility for all conditions and policies attached to new, innovative, or experimental products/services/programs.

Board members of nonprofits should be prepared to do some work outside of board meetings to meet the needs of the organization. Every organization has expectations for its own board members, but if yours does not have a paid manager or staff leader, the board may be intimately involved in the organization's day-to-day operations. (While this situation is not considered ideal, it is quite common in small grassroots entities.) If you have a manager or a coordinator, the board may focus on big-picture duties that staff doesn't have time carry out, such as fundraising, marketing, or relationship development with partners and government officials.

It's a good idea to write a board member job description and include what you expect from your board. The job description can be shown to people who you want to recruit as board members, so that they know what they're getting into. The document can also serve as a board member agreement that new members sign, confirming that they will fulfill their duties. A sample is shown in Appendix E.

A board also must have officers, which typically consist of a president, vice president, secretary and treasurer. These individuals will have duties specific to their office, and should be given a job description that describes their duties.

### Finding the right board members

Consider the existing diversity of skills and personal qualities you have and need on your board of directors. For example, if you have a lawyer on your board, it could save the organization from having to pay for basic legal advice. If you have someone with social media experience, it could save a lot of time and energy in marketing and public relations. It is beneficial to have a good mix of idea-people, detail-people, people-people, listeners, and facilitators.

Since community organizations serve a diverse constituency, recruiting board members from diverse backgrounds is equally important. Racial and socioeconomic diversity on your board can provide the perspective necessary to make sure that the organization is serving the whole community. Age diversity can help provide the right mixture of energy and experience among your volunteers. To help you

think about diversifying your board member assets, backgrounds and skills, a board member recruitment matrix is provided in Appendix F.

### Learning to be a Great Board

There are plenty of educational and training resources to help board members prepare for their duties. Helpful websites include:

**Boardsource** is considered one of the definitive sources for best practices in nonprofit governance. It offers many free trainings and publications, including a series of "101" guides in the Community Resources section. <http://www.boardsource.org/>.

**Free Management Library** provides a comprehensive guide to board responsibilities and operations organized by topic. <http://managementhelp.org/boards/>.

**Compass Point** includes an interactive, "virtual conference" training for new board members, templates for planning, budgeting, and other resources. <http://www.compasspoint.org/>.

Iowa-based entities that provide training in nonprofit oversight, and other useful training for nonprofit board members, include:

- **Nonprofit Management Academy (NPMA):** The academy is hosted by county offices across the state with the assistance and input of local nonprofits. The content of each academy differs depending on the feedback of area nonprofit agencies and usually consists of 10 full day classes, one day per month, over a year, amounting to 70 contact hours. To host a NPMA, ask your ISU Extension and Outreach county office or contact Brian Perry, NPMA Program Manager at [bmperry@iastate.edu](mailto:bmperry@iastate.edu). <http://www.extension.iastate.edu/communities/npma/>.
- **The Larned A. Waterman Iowa Nonprofit Resource Center:** The center offers resources and training opportunities such as "Start a Nonprofit" workshop hosted by The University of Iowa College of Law multiple times each year. <http://law.uiowa.edu/>.
- **Regional Food System Working Group:** Food system practitioners meet for quarterly meetings that offer professional development and networking opportunities. Find more information at: <http://www.leopold.iastate.edu/regional-food-systems-working-group/>.

## Committees

Some local food organizations and most nonprofit organizations form committees to handle various aspects of operations. Committees can be handy for addressing issues that need more research, discussion, thought and care than the board is able to handle efficiently during its meetings. They also are a way of making sure that one or two individuals are not burdened with all the work of running the organization. Committees led by board members may include other members who are volunteers from outside the board, if allowed by your organization's bylaws. This is a good way to engage volunteers, identify skills and use talents of members that may have been overlooked.

Dubuque's local food organization led by Carolyn Scherf, ISU Extension and Outreach, employs the following subcommittees:

- **Farm to School:** Teach students about where their food comes from. Encourage greater appreciation and appetite for fresh, healthy foods by working with school leadership to provide foods from local farms, classroom presentations, farm field trips, campus education on local products and support for school gardens.
- **Food Access:** Work to ensure everyone has access to nutritious food by increasing awareness and acceptance of SNAP, at farmers markets. Conduct nutrition and cooking education activities with an AntiHunger VISTA member. Engage hospitals in development of a Community Benefit "Veggie Voucher" Program and extend support to community gardens.
- **Local Foods Promotion:** Increase awareness of the positive impact of local foods on the social welfare, economy, environment and health of communities through educational activities, public events, fundraisers, presentations, and media campaigns including, Buy Fresh Buy Local, Farm Crawl and Food Chain Summit.
- **Business Development:** Build the capacity of the local food system through support of new growers. Organize and coordinate producer and purchaser relationships. Develop business entities such as farm incubators, aggregators, food hubs and value-added facilities.
- **Farmer Training and Workshops:** Provide educational opportunities for the region's farmers and producers. Assist producers' efforts in growing their operations and producing more fresh foods. Workshop idea topics may include

business processes, farming techniques, financial management and food safety practices.

Committees can do a lot of the organization's work, but beware of a few pitfalls. If you are located in a small community or are new, you may have only a few people involved. Group dynamics may work better by making decisions as a whole group rather than dividing into smaller groups. Lack of a good leadership structure makes it difficult to hold committees accountable. To avoid these issues, consider these tips:

- **Form committees only as needed:** *Standing* committees, that exist indefinitely, or *ad hoc* committees, that are disbanded once the task is finished, are good solutions when problems, research and complicated plans are too difficult to solve with thirty minutes of discussion.
- **Find a good committee chair:** All committees need a chairperson to make sure the work gets done. Without a chair committed to completing tasks on time, members may become disinterested in the committee and in the organization as a whole. The chair also needs to be capable of leading a good meeting. Leadership qualities of the chair include listening, fostering committee member involvement and the ability to take action. If you don't have a good chair, don't form a committee; find another way to get the work done, perhaps delegating it to one reliable volunteer or hiring someone to do it.
- **Encourage committee chairs to recruit from outside the board:** Additional expertise brings new energy and ideas.
- **Set concrete objectives, with dates:** Committee objectives should be decided at board meetings and included in the minutes, which should be sent out promptly to remind each committee of what they agreed to do. Each committee should be asked to report back on its accomplishments at every board meeting.
- **Require timely committee reports to organizational leadership:** If a committee gets too engaged, it can run away with its project, leaving behind the organization's official leadership. Make sure committees check in with the board of directors before moving forward with important decisions or activities.
- **Discuss committee structure annually:** Committees may need to be disbanded, restructured, or new ones started. This process should be reviewed each year as part of your group's strategic planning process.

## Champions

In practice, most new organizations cannot get started without one or two **champions** who handle startup work in the initial months. In a cooperative or nonprofit, a champion often serves in an unpaid role, such as board president, and feels strongly enough about the work of the organization that he or she is willing to commit substantial personal time to make it happen. Boards and committees are valuable for setting policies, discussing complex issues, and making decisions, but passionate individuals are usually the ones who get things done.

Primary stakeholders of the organization can be excellent champions because they have a deep understanding of why the work is important. Your organization may find that it needs several champions who can function in different environments. Do you need a champion who is well-respected in the farming world, or a financially savvy champion who can talk fluently with bankers or funders, or both?

Being a champion carries great responsibility. A good champion puts the mission of the organization first, and does not advance his or her personal perspectives or interests in the name of the organization. If this is happening, especially in the early start-up stages, it's critical that other members of the organization intervene. Be aware of a champion with a strong personality, whose voice may drown out those of other stakeholders. Remember to appreciate and cultivate the volunteers who are helping out in less visible ways, and not only those volunteers who represent your organization publically. Finally, an organization may be driven by a small group of active leaders, but it must take into account the reality that unpaid champions may not make the same time commitments forever, and life changes may require a shift in roles over time. The organization must keep an eye out for new leadership as the organization evolves.

## Organizing Managers and Employees

People power is the most important part of any business or organization. How will the work be completed? Will you use volunteers, paid staff, or hired contractors? Will you take advantage of national service programs like Food Corps or AmeriCorps? This section discusses some options and offers tips on how to support and retain employees over time.

## Staff Retention and the Challenge of Turnover

Organizations that operate with grant funding almost always have to deal with the problem of staff discontinuity. Staff turnover can be a major issue for small, values-based organizations and businesses that are working with limited resources and are funded year-to-year by short-term grants. Sometimes the turnover is expected, for example, when AmeriCorps members complete their service period or contractors complete a contract. In other cases, staff members may leave with little warning due to inadequate salary or unclear job expectations. Losing a staff member can have an especially large impact for an organization in the local food sector where the work requires specialized knowledge of farm practices, marketing, business management, the regional landscape, and more. Furthermore, if staff members are constantly leaving, it is difficult to sustain the kind of relationship-based collaboration necessary for strong food systems. One study on farmers' market closures in Oregon found that manager turnover and low-paid or volunteer market managers were two of the five major factors that caused markets to fail.<sup>5</sup>

The 2013 Nonprofit Employment Trends Survey found "90% of nonprofits do not have a formal strategy for retaining staff despite indications that staff retention is an organizational challenge." <http://www.nonprofitr.com/wp-content/uploads/2013/03/2013-Employment-Trends-Survey-Report.pdf>.

Iowa Principles of Practice for Charitable Nonprofit Excellence recommends the following practices:

1. Staff and volunteers should receive clear direction from and regular supervision and evaluation by their supervisors.
2. Organizational policies and practices should address human resource issues and be made available to staff and volunteers.
3. A motivational environment and recognition of work well done are powerful stimuli for staff and volunteers.

Clearly, paying a fair-market wage or salary and providing adequate benefits can improve staff retention. Non-salary strategies for retaining employees include flexible schedules, training and professional development, employee involvement, appreciation and celebration, building a positive workplace culture, and establishing mentorship relationships inside and outside the organization.<sup>6</sup> In 501(a) cooperatives, it also is considered a best practice to give staff a small ownership stake in the cooperative. Owner equity

helps align the goals of staff with the goals of members (who also own equity) and provides an extra incentive for staff to help the cooperative grow.

It is critical that staff be aware of how their work connects to the mission of the organization. As one University of Nevada study points out, “the demands for more accountability and proof of program results are placing more pressure on nonprofit employees, and as a result, their connection and belief in the agency’s mission is becoming less important.”<sup>7</sup> Streamlining data collection, reporting and recordkeeping practices can help prevent administrative responsibilities from consuming too much energy. This allows staff to dedicate time to mission-oriented aspects of their work, or to rewarding activities such as special projects, professional development activities, or forming meaningful relationships in the broader local food community.

To develop job descriptions it is helpful to start with examples from other organizations. ISU Extension and Outreach and the Leopold Center For Sustainable Agriculture have published a document on local food coordinator duties that includes a sample job description. <https://store.extension.iastate.edu/Product/Local-Food-Coordiators>. For farmers markets, a comprehensive training manual is available from the Farmers Market Federation of New York at <http://www.nyfarmersmarket.com/> under Resources for Market Managers.

## Contractor or employee?

For some kinds of tasks, an organization may decide to hire employees. For other kinds of tasks, it may make more sense to contract out the work to a company or individual. It is important to note that your organization will have very different legal, tax, and financial obligations depending on whether someone working for you is classified as an employee or as a contractor.

Iowa Workforce Development states that to hire an employee, your organization must:

- Withhold income, FICA (Social Security), and Medicare taxes from the employee’s wages (7.65 percent of income).
- Pay FICA and Medicare taxes in addition to the employee’s share.
- Pay unemployment taxes (which provides insurance coverage if the worker is laid off).
- Buy workers’ compensation insurance (which provides insurance coverage if the worker is injured on the job).

- Comply with wage, overtime, and other benefit state and federal laws.

When hiring an independent contractor, an organization or business generally does not have these legal obligations. However, independent contractors function entirely differently from employees.

According to the Farmers Market Federation of New York, contracted farmers market managers are “paid a flat hourly rate with an agreed upon timeframe and weekly, monthly or annual limits to what they will be paid. The [organization] does not have the expenses associated with FICA, workers’ compensation, unemployment insurance, etc. The [organization] runs the risk of running out of money before the job is done, but the work can be focused and directed at maximum budgetary efficiency.”

There are significant legal limitations to how contractors can serve your organization, and the U.S. Department of Labor has become more stringent in enforcing the distinction between contractors and employees. **Your organization could be harshly penalized if you pay someone as a contractor but treat them like an employee.** The Northeast Organic Farming Association provides the following explanation in “Organizing and Maintaining Your Farmers Market” regarding the requirements for contracted farmers’ market managers:

*... The individual you hire must actually qualify as a subcontractor by meeting three criteria. All three conditions, A, B and C, must be met, for an individual to qualify as a subcontractor:*

- A. The individual has been and will continue to be free from control and direction over the services performed, both under contract and in fact (meaning that a market does not supervise the manager, work is given and the manager will work on their own, tools and supplies will not be provided); and
- B. The services performed by the individual must be outside the usual services provided by the employer’s business or the services are performed outside all the places where the employer performs services (meaning that the manager does not work out of an established office of the person/organization that hired them); and
- C. The individual is customarily engaged in an independently established trade, occupation, profession or business (meaning the individual should be registered with the state, provide this service to others, have workers’

compensation, general liability insurance, and have a work history as an independent contractor.)...

If your manager does not meet these criteria, hiring the manager as a subcontractor is illegal and the manager must be hired as an employee. Your market will have to pay the appropriate employment taxes, make the appropriate deductions from the manager's pay, and purchase workers' compensation insurance.

As a rule of thumb, **if a person is doing contract work only for your organization, and not providing similar services for anyone else**, you are in violation of "C" above. The individual should be your employee, not a contractor. For more information on the legal requirements for employers and contract arrangements, visit the Iowa Workforce Development website: <http://www.iowaworkforce.org/> or seek legal advice.

### Staffing through a third-party organization

If a contract arrangement will not work for you, and your organization does not want to manage the paperwork to hire an employee, you can try hiring staff through a third-party organization (such as your fiscal sponsor) or through a professional payroll management service provider. This option makes it possible for the third party to become the official employer of your market manager and would issue his or her paychecks. However, payroll management service providers often charge a hefty percentage on top of each paycheck, and many providers do not like to deal with organizations that have only one employee. So, persuading a local organization to officially employ your staff may be the easiest option. As with fiscal sponsorship, make sure your organization has a written agreement (e.g. a Memorandum of Understanding) with the employer.

### AmeriCorps and FoodCorps

If used strategically, AmeriCorps and FoodCorps positions can be a great way to expand your organization's capacity provided you devote the resources needed for them to succeed. Service members spend a specified time period providing community service to nonprofits and government entities. Service members cannot be employed by businesses, although in some cases they can be hired through a nonprofit fiscal sponsor. Regardless of the situation, having a clear plan in place for supervision of service members and having one person designated as the supervisor, is absolutely critical to the success of the relationship.

AmeriCorps State members provide direct services through placements with Iowa schools, nonprofits, state and local governments, and others. At least eighty percent of a member's time is spent providing service and the remaining twenty percent may be spent in training with fellow service members.

AmeriCorps VISTA members provide service that aims to eliminate poverty. Rather than offering direct service, AmeriCorps VISTA activities emphasize fundraising, grant writing, creation of training programs, and development or improvement of agency systems. Applying for AmeriCorps funding to hire an AmeriCorps member is similar to applying for a grant. The following organizations are eligible: private not-for-profit corporations, public agencies, local governments, educational institutions, labor organizations, not-for-profit and community-based organizations. For more information on AmeriCorps or AmeriCorps VISTA, check out Volunteer Iowa's website at: <http://www.volunteeriowa.org/Home.aspx/>, contact [icvs@iowa.gov](mailto:icvs@iowa.gov) or call 800-308-5987.

FoodCorps members are a specific type of AmeriCorps volunteer. They teach children about food and nutrition, build and tend school gardens, and help source local food for school cafeterias. Their day-to-day work is supervised by state-level host sites. The host sites are responsible for developing a network of community-level service site partners. Find more information at: <https://www.foodcorps.org/>.

Members of Corps programs and national service programs can be a great asset for getting new projects established or for providing specific services. However, they are not a good way to carry out the core activities of your organization. Service members are only modestly compensated, and are often sacrificing better-paid opportunities in order to gain experience doing something they care about. Providing a good experience to a service member requires time, energy, professional development, a clear work plan, and a dedicated supervisor who meets with them weekly. Furthermore, if a service member is responsible for too many central aspects of the organization's work, momentum may be lost when that person's term of service ends. If full-time staff members are not available to supervise service members and to provide continuity when service members leave, you should think very carefully about whether one of these programs is appropriate for your group. Successful service member projects can be supervised by volunteers, but the volunteer must be a diligent, committed and capable manager.

## Appendices:

Appendix A: Mission Statements—A group activity

Appendix B: Stakeholder Analysis

Appendix C: SWOT Analysis

Appendix D: Sample Strategic Planning Template

Appendix E: Board Member Job Description

Appendix F: Board Member Recruitment Matrix

### Appendix A: Mission Statements— A Group Activity

A good mission statement is like a bright lighthouse that you can look to for guidance as you make decisions in line with your organization's purpose. It also is part of the face that your market presents to the public. The following activity will help your group write a mission statement. It can be done with the board of directors of your organization or with a mixed group of stakeholders who are involved in setting up the organization, which ideally is a group of five to ten people. Discussion is important, so allow at least an hour to complete the activity.

Choose a discussion leader to guide this activity.

Necessary materials: flip chart or several large pieces of paper, thick magic markers, two small stickers per person, and extra pens and paper for everyone.

## Group activity

- The following are examples of missions that a local food organization can help fulfill. To get your group thinking, write some examples like these on a flip chart or large piece of paper ahead of time.
  - Help new farmers to get started in business
  - Provide a profitable sales outlet for farmers and build the local economy
  - Provide a friendly and lively community space
  - Promote healthy living
  - Make healthy food accessible to all, including low-income families and seniors
  - Increase community knowledge about farming and where food comes from
  - Bring more business into the area (e.g., downtown)
  - Protect the environment and improve the watershed
  - Provide hands-on education opportunities
  - Increase the capacity of regional food distribution systems to serve more farms and value-added food businesses
  - Reach additional market outlets
  - Increase investments in food system enterprises
  - Other
- Invite group members to review listed items. Brainstorm as a group about additional possibilities and write them on the same flip chart, listing all options together.
- Give each person two small stickers and ask them to place the stickers next to the two functions they believe are most important for the organization's mission.
- As a group, review the most popular items on the list. Focus on the top three, inviting group members to discuss their selections.
- Now the group is ready to begin drafting a mission statement. Remind everyone that the mission statement is **a one-sentence statement describing the reason your organization exists**. It will be used to guide decisions about actions and priorities, and should help the public understand the purpose of your organization. It should be **clear, memorable and concise**. (If you'd like to share examples of mission statements from other organizations, a list can be found at [topnonprofits.com](http://topnonprofits.com/examples/nonprofit-mission-statements/). <http://topnonprofits.com/examples/nonprofit-mission-statements/>)  
Give them the following assignment: "In your own words, write a sentence that describes the mission of the organization. Begin the statement with 'The organization's mission is to...' It should reflect the one to three most important items from the list we just made. Try to keep it down to twenty-five words or less."
- Once everyone is done writing their mission statement, go around the room and ask each person to read their statement aloud. Invite everyone else to take notes on things they like about the mission statements that are being read.
- After everyone has read his or her mission statement, ask the group to talk about which of the mission statements or phrases they liked best and why they liked them. Give the group a few minutes for discussion while writing down favorite phrases for group reference.
- Now that you've heard several different examples of mission statements, give everyone a few minutes to try to write a GROUP mission statement that encompasses the favorite phrases from Step 3.
- Invite two or three people to read their mission statements aloud to the group. Write the entire statement on the flip chart as they are being read. (The statements will probably be similar, so not everyone needs to read theirs.)
- Read the two to three group statements aloud again and take an unofficial vote to find out which statement is preferred by most. Give dissenters a chance to explain their reservations and take time to edit the statement together to resolve any problems.
- Once you have completed editing, ask everyone for a show of hands in support of the preferred mission statement that you have created together. Once everyone is in agreement, you have a mission statement! If some do not concur, your group may wish to form a committee that will revisit the preferred statement, make more edits, and present it to the group for a review at the next meeting.

## Appendix B: Stakeholder Analysis

Provided by Kelly Nix West Virginia University Extension Service.

A **stakeholder** is a person or organization likely to be *impacted by* your organization, and/or someone who *has impact on* your organization's efforts. The impacts can be positive or negative.

A **stakeholder analysis** is intended to develop cooperation between your organization and its stakeholders. It can be done when the organization is first being formed, but it also is helpful when you need to think about the consequences of a particular decision for the members of your community. This group activity is intended to help your market think about its stakeholders.

1. On a large flip chart or dry erase board, determine which stakeholders belong in each of the following categories:
  - a. **Primary stakeholders:** Those directly impacted by the actions of your organization: farmers, customers, business owners.
  - b. **Secondary stakeholders:** Those indirectly affected by the actions of your organization. These might include intermediaries who serve your primary stakeholders: local governments, FFA teachers, extension offices.
  - c. **Key stakeholders:** Those who have influence on or are important to the success of your organization. These may include individuals within your organization, and some of them also may be primary or secondary stakeholders as well.
2. After looking at the whole list consider whether any stakeholders need to be moved to a different section.
3. For each of the stakeholder you've listed, discuss, what you think they would consider success and what you think would they would expect from you.
4. Discuss the advantages and logistics of possibly involving them in your operations and decision-making.

## Appendix C: Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

The following is an example of a SWOT analysis for a farmers market:

<p><b>Strengths</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• 20 reliable vendors</li><li>• Good product diversity</li><li>• Early/late season customer head count increased from last year</li></ul>	<p><b>Opportunities</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Rent pharmacy parking next door</li><li>• Use Family Resource Network for better SNAP outreach</li></ul>
<p><b>Weaknesses</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Not enough parking</li><li>• Need more products in May</li><li>• SNAP customer outreach</li></ul>	<p><b>Threats</b></p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Price disagreements among vendors</li></ul>

There are numerous variations on how to complete an organizational SWOT with a group of people.

Try these:

- Brainstorm in a small group to fill out the whole chart together.
- Ask board members to fill in the chart on their own or at home, then compare answers as a group.
- Post four separate large pieces of paper, one for each category. Have group members walk around with markers and fill in each piece of paper on their own. When everyone is done have everyone place stickers next to their top items in each category.



### Appendix D: Sample Strategic Planning Template for a Farmers Market

Name of Organization: Year   Time Period:						
Area of Plan	Goals	Tasks	Person Responsible	Timeline and Deadline	Resource Needs (financial and human)	How will we Evaluate Success?
Finance						
Producer Development						
Facilities						
Programs Services and Education						
Marketing						
Community Partnerships						
Human Resources						
Organizational Structure						
Risk Management and Regulatory Compliance						
Other						

## **Mission**

XYZ Nonprofit's mission is to (fill in)  
For more information visit XYZ's website at (fill in)

## **Position**

The Board will support the work of XYZ and provide mission-based leadership and strategic governance. While day-to-day operations are led by XYZ's chief executive officer (CEO), the board-chief executive officer (CEO) relationship is a partnership, and the appropriate involvement of the board is both critical and expected. Specific board member responsibilities include:

## **Leadership, governance and oversight**

- Serve as a trusted advisor to the CEO as he/she develops and implements XYZ's strategic plan.
- Review and regularly measure XYZ outcomes and metrics for effectiveness; review agenda and supporting materials prior to board and committee meetings.
- Approve XYZ's annual budget, audit reports, and material business decisions; remain informed of, and meeting all, legal and fiduciary responsibilities.
- Contribute to an annual performance review of the CEO.
- Assist the CEO and board chair in recruiting other board members.
- Partner with the CEO and other board members to ensure that board resolutions are carried out.
- Serve on special assignment committees.
- Represent XYZ to stakeholders and act as an ambassador for the organization.
- Ensure XYZ's commitment to a diverse board and staff reflects the communities XYZ serves.

## **Fundraising**

Since XYZ is a philanthropic organization that can credibly solicit contributions from foundations, organizations, and individuals, XYZ expects to have 100 percent of its board members make an annual contribution that is commensurate with their capacity.

## **Board terms/participation**

XYZ's board members will serve a three-year term to be eligible for re-appointment for one additional term. Board meetings will be held quarterly and committee meetings will be held in coordination with full board meetings.

## **Qualifications**

This is an extraordinary opportunity for an individual who is passionate about XYZ's mission and who has a proven record of board leadership. Selected board members will have achieved leadership stature in business, government, philanthropy, or the nonprofit sector. Board member accomplishments will allow him/her to attract other well-qualified, high-performing board members.

Ideal candidates should have the following qualifications:

- Extensive professional executive leadership experience and accomplishments in business, government, philanthropy, or the nonprofit sector.
- A commitment to XYZ's beneficiaries, preferably based on experience.
- Savvy diplomatic skills and ability to cultivate relationships and build consensus among diverse individuals.
- Integrity, credibility, and a passion for improving the lives of XYZ's beneficiaries.
- Service on XYZ's Board of Directors is without remuneration, except for administrative support, travel, and accommodation costs in relation to board member duties.

## Appendix F: Board Member Recruitment Matrix

This is an example of a matrix used by an organization to assess the skills and characteristics of its current board of directors, in order to identify gaps that could be filled as additional board members are recruited.

Skill areas	Name 1	Name 2	Name 3	Name 4	Name 5	Name 6
Administration/Management						
Farming / Food Production						
Accounting / Financial oversight						
Fundraising						
Partnership Building						
Food Safety						
Insurance & Liability						
Human resources, hiring & firing						
Strategic planning						
Food purchasing and distribution						
Working with government						
Technology (social media, file sharing, etc.)						
Meeting facilitation, leadership						
<b>Resources</b>						
Money to give						
Access to donors (foundations, corporate)						
Availability to fundraise and write grants						
<b>Community Connection</b>						
Farmers						
Social service, human health						
Food service						
Food retail						
Low income communities						
Media						
Elected officials						
Faith community						
<b>Personal Style</b>						
Concensus builder						
Good communicator						
Strategist						
Hands-on "do-er," builder, implementer						
Visionary						
<b>Age</b>						
Under 18						
19 – 34						
35 – 50						
51 – 65						
Over 65						
<b>Gender</b>						
Male						
Female						
Transgender						
<b>Race/Ethnicity</b>						
African American/Black						
Asian/Pacific Islander						
Caucasian						
Hispanic/Latino						
Native American/Indian						

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