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Full Circle:
Building a Local Economy through
Pollinator Enterprises in the Food System

Catie DeMets
Portfolio submitted in partial fulfillment of
Masters of Science, Environmental Studies Program
University of Montana
Missoula, MT
May 2018

ACKNOWLEDGEMENTS

I am grateful to so many people for showing me the meaning of happiness, generosity, and wisdom in my journey to graduate school. Thanks to Judy Ferreri, for your mentorship, love, and all the chocolate we ate while playing Chopin. Hannah Plummer, Chelsea Johnson, and Inanna Craig-Morse: I am forever indebted to you for your friendship and the many ways in which you inspire me to be my best self. Thank you to the Wild Rockies Field Institute for teaching me how to be a backcountry badass and develop a deep sense of place. And, to the ladies at The Wedge Community Co-op, including Leah Korger and Kenzie Becco, thank you for showing me a blast (and how to wield a knife) in the kitchen. To my amazing and unbelievably fun friends who I met in the mountains of Italy “studying geology” (i.e., drinking a lot of Verdicchio), especially Sandro Montanari: I would not be who I am without you. Many thanks to my favorite professors at Lawrence, including Jeff Clark, Marcia Bjørnerud, and Andrew Knudsen, for showing me what amazing teaching is and providing unwavering support in spite of my frequent tardiness to class.

Special thanks to (in no particular order)...

Neva Hassanein: You have been an amazing advocate for me. Thank you for your guidance and support, and for encouraging me to follow my interdisciplinarian urges into the depths of academia while reminding me, by your example, of the importance of community activism.

Josh Slotnick: Since the moment I stepped onto the PEAS Farm, you have encouraged me to pursue my interests with passion, verve, and dirt under my fingernails. Thank you for exemplifying this with the frantic joy required of someone as busy and embedded in your community as you are.

Lake County Community Development Corporation and Community Food and Agriculture Coalition, particularly Brianna Ewert and Kim Gilchrist: Thank you for your keen support and oversight in much of this portfolio’s work, and for being awesome bosses.

Kristi Govertson, Jakki Mohr, Molly Bradford, and Christine Littig: Thank you for cheerleading me through the grueling and befuddling process of building my business.

The Environmental Studies Department and my classmates: You have all deeply shaped my personal and professional growth. Thank you for sharing your friendship and wisdom with me.

Rudy Molinek: Thank you for making me laugh when I’m in a terrible mood, and for making the sunny days sunnier. You are a source of happiness, love, and irreverence, and I am so grateful to have you to help me raise an impossibly cute and annoying coonhound and a bratty chocolate lab.

My family: Thank you for your unconditional love, support, and weirdness, which have made me the person I am. I am inexpressibly grateful for you.

Thanks to all of you, and to many others. I owe you, big time.

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INTRODUCTION

Food is one of my great loves. For as long as I can remember, I have been obsessed with understanding food intimately and comprehensively. During my time as an undergraduate at Lawrence University, the disparity between my peers' passing interest in food and my fervent exploration of the campus's food options, practices, and suppliers revealed that my identity was entangled with food far more than I'd previously grasped. At the time, the thought of incorporating my love of food into my life's plans barely crossed my mind. But as I met people and gained experiences, I realized how many opportunities existed to apply my skills and passion for food. These opportunities came into focus when I stumbled into a deep interest in the cooperative model and the economic side of the food system while cooking for The Wedge Community Co-op in Minneapolis, MN. There, I adored the people, the business, and the work, but my urge to understand food systems tugged me westward to learn, gain experience, and help others—all at the same time!—in a variety of synergistic endeavors. My portfolio offers a sample of this learning.

Throughout my graduate studies, I have refined my understanding of the food system and where my interests lie. I have learned, with some measure of dismay, about power inequities and corporate concentration in agricultural markets and beyond (Shuman 2015). But in equal measure of hope, I have learned about the alternative food movement. I have become passionate about how the intersection of democracy, economy, and agriculture can restore equity to our social, economic, and environmental systems. As the alternative food movement gains traction in mainstream American society, it is essential to document how enterprises in the movement are building robust local economies. The movement “has successfully shone the spotlight on hunger and food access in the US, created a drive for more local food, and gotten better policy from the federal to the local level” (Holt-Giménez 2010: 1), yet no assurance exists that our society's interest in food issues is not a “passing fad.” Rather, we should ask: “how do we turn initial reforms into lasting food system transformation?” (Holt-Giménez 2010: 1). Understanding and sharing how enterprises are building local economies is central to creating enduring food system transformation. This broadly guides the mission of my portfolio.

In exploring the confluence of democracy, economy, and agriculture, I came across a refreshing set of guiding principles for sustainable economic development, as outlined by Michael Shuman in *The Local Economy Solution* (2015: 47):

- “Nurture the start-up and growth of locally owned businesses.
- Maximize cost-effective self-reliance through import substitution, while expanding exports from local businesses.
- Identify, celebrate, and spread models of triple-bottom-line (people, planet, profit) success in local businesses.
- Accomplish as many of these goals as possible through private investment.”

Shuman explains that these principles should be applied by “pollinator” enterprises, which “carry the best elements of one local business to another, thereby fertilizing all local businesses and creating a healthy entrepreneurial ecosystem” (2015: 15). Upon reading *The Local Economy Solution*, it seemed to me that Shuman had pinpointed crucial flaws in mainstream society’s approach to economic development. His views aligned with my experience of how some food system advocates—pollinators—are building resilient local economies (i.e., local economies that embody Shuman’s principles of sustainable economic development). I became curious: What do pollinator enterprises in western Montana’s food system look like? How are they building a resilient local economy? My portfolio dives into these questions.

Specifically, my portfolio synthesizes my graduate research and experience of four pollinator enterprises in western Montana’s food system that are applying Shuman’s economic development principles to build a resilient local economy. *Why study the economic angle?*, you might ask. Good question, and I hope a good answer: The alternative food movement is, in large part, a response to corporate concentration and the deification of neoliberal ideals (e.g., growth for the sake of growth), which perpetuate inequality and the enrichment of the privileged at the expense of the marginalized (Bonanno 2014). In response, the alternative food movement seeks to create resilient local food systems, which also requires establishing equity in our local economies. I have chosen an economic lens through which to study the food system because it represents such an essential part of building long-term food system transformation.

The elements of this portfolio, described in greater detail below, are linked both topically and in terms of process: each falls on a different position along the arc of an enterprise’s life cycle. As a whole, therefore, this portfolio documents the recursive nature of enterprises—businesses, organizations, and partnerships—that are building resilient local economies, from design to reflection and back (see Figure 1):

1. **Business Plan:** The first element is a business plan for Mirthful Farm, a “pizza farm” and community-building center I plan to start in the next few years. This portfolio presents my experience of designing a business aiming to embed Shuman’s principles in its mission. This endeavor involved a variety of activities, courses, and trainings that supported the business plan’s development.
2. **Co-op Case Studies:** The second element, two case studies of local, agricultural, producer cooperatives that I conducted for Lake County Community Development Corporation (LCCDC), examines the challenges and successes of cooperative implementation and development.
3. **Program Evaluation:** The final element, a formal evaluation of Community Food and Agriculture Coalition’s (CFAC) “Community Food Project,” evaluates and reflects on the design, process, and activities of a multi-year, regional food access program.

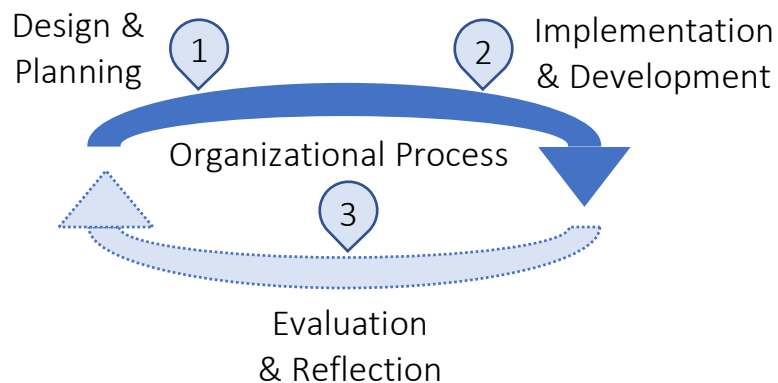


Figure 1. Conceptual model for a business or organization’s life cycle or work process, with numbers corresponding to portfolio elements 1, 2, and 3, as described above. This figure also represents a “road map” for my portfolio’s narrative.

Business Plan: Designing a Business that Enacts Core Values of the Alternative Food Movement

Due to a strong trend in consumer behavior towards eating and buying local food products, many enterprises have jumped onto the “buy local” bandwagon. For large corporations, such as Wal-Mart and McDonald’s, this trend represents a desirable marketing opportunity that, in their eyes, requires little or no significant change to their operations or design (Forbes 2009). These corporations’ goal is maximizing profit, rather than aligning their actions with their messaging. They engage in mass-marketing that superficially appeases consumers’ demands for local products without changing their products or actions to meaningfully align with the values of the “locavore” movement. As a result, consumers are often confused by misinformation and conflicting messages about what buying locally truly means. This is not entirely the fault of these corporations, but rather a system that has not built corporate accountability into its structure (Kelly 2012; Bonanno 2014; Shuman 2015) and has supported actions that prioritize growth above other values.

Meanwhile, enterprises in the alternative food movement often lack the resources or experience to educate and empower consumers about the true value and purpose *behind* buying local products—a similarly systemic problem, but due to the fact that their movement is currently small, fractured, and highly diverse in strategy and approach to solving social and environmental problems. But there is a catch-22 in this fact: only through a concerted effort towards consumer education and empowerment to make informed, values-based choices will the alternative food movement gain an upper hand on corporate misinformation.

For enterprises in the alternative food movement, design problems (such as a lack of emphasis on creating a viable or grant-independent economic model, lack of investment in professional marketing, and lack of resources to share successes and pollinate other local enterprises) often undermine their ability to create of lasting, meaningful reform to our food system. Given that the movement is relatively young and grassroots, there are few examples of enterprises that have successfully implemented values-based education and messaging to large public audiences. Even

where these success stories *do* exist, they usually are not widely shared, leaving each new enterprise to reinvent the wheel in their design, rather than building on existing models. The first element of this portfolio addresses this problem by documenting and sharing the design stage of a business in the alternative food movement. Specifically, I created a business plan for Mirthful Farm, a “pizza farm” and community-building organization I aim to start after graduate school.

Mirthful Farm’s vision and design are rooted in the values of the alternative food movement, including such principles as: human and community food sovereignty and democracy, regionally-based food systems, sustainable agricultural practices, and fair wages (Holt-Giménez 2010). I designed Mirthful’s business model around enacting these values, rather than simply stating them in Mirthful’s mission. Through this, I intend for Mirthful to become a pollinator enterprise. Given that the business is yet to be tested, however, I do not know whether this will be the case. For now, learning how to design a values-oriented business is my most salient takeaway. I once complained to Josh Slotnick about feeling ineffective as a student rather than an activist. He advised me to use graduate school to “Start slow now so you can go fast later.” After spending the past two years designing Mirthful, I realize the wisdom and truth in that statement.

Co-op Case Studies: Developing a Robust Cooperative Model through Trial, Error, and Success

Since the 1800s, people have joined forces and exercised their collective economic power against corporate concentration of economic power, market volatility, and marginalization of people and the environment (Nadeau 2012; Jackson 2009). Over time, many groups have adopted the structure of cooperatives, which are autonomous, jointly owned, and democratically-controlled businesses comprised of people who come together to meet their common economic, social, and cultural needs and aspirations (Nadeau 2012; International Cooperative Alliance n.d.). As the dominant agricultural industry consolidates into fewer and fewer mega-corporations (Reuters 2018), establishing resilient local economies infused with pollinators who offer viable and superior alternatives to corporate consolidation could not be more urgent.

In response, cooperatives throughout western Montana are actively pursuing regional, alternative strategies for building a resilient local food system and economy. As cooperatives were one of the topics I wanted to learn more about in graduate school, I pursued the unique opportunity to partner with Lake County Community Development Corporation (LCCDC) to study two of these cooperatives in western Montana: the Montana Poultry Growers' Co-op (MPGC) and Triple Divide Organic Seed Co-op (herein referred to as Triple Divide). In both cases, my goal was to learn more about their development and how they are building a more resilient local economy through trial, error, leveraging their successes, and acting as pollinators.

In the MPGC case study, I used the 2016 construction of their poultry processing facility in Hamilton, MT as a focal point for discussing the co-op's challenges and benefits with nine members and partners. Based on this qualitative research, I produced a report for LCCDC and an article for the U.S. Department of Agriculture's (USDA) *Rural Cooperatives Magazine*. In the case study of Triple Divide, I interviewed all eleven members of the co-op to learn their perspectives on the challenges, benefits, and successes of developing a small, regional seed cooperative over time. Based on results of this research, I wrote a report for LCCDC that was distributed at the 2018 Montana Cooperative Summit, among other channels. This section of my portfolio presents these three documents. Within the scope of my portfolio, this research represents a critical examination of the implementation stage for organizations—in this case, two agricultural producer cooperatives experiencing the growing pains and newfound opportunities of development and pollination in the context of western Montana's local economy.

Program Evaluation: Reflecting on the Process for Future Improvement

Formal program evaluation is a growing field and practice for businesses and organizations. Many program evaluation resources define it as “the systemic collection of information about the activities, characteristics, and outcomes of programs to make judgments about the program, improve program effectiveness, and/or inform decisions about future program development” (Centers for Disease Control and Prevention 2018). Program evaluation has become particularly

prevalent in the nonprofit sector as a structured way to gather information for grant reporting, but also to increase program and organizational effectiveness and efficiency. Now, other sectors are applying the principles of program evaluation to strengthen their practices. Program evaluation offers a framework for reflecting on and improving processes to achieve stronger outcomes. As such, it is a powerful tool for informing iterative organizational design by methodically evaluating and honing previous experience to advise future activity.

The final element of this portfolio is a formal evaluation report of Community Food and Agriculture Coalition's (CFAC) "Community Food Project," a USDA grant-funded program running from October 2015 to October 2017. CFAC's program aimed to increase low-income people's access to local food—and, in turn, their self-reliance—in western Montana. The evaluation, which I conducted in partnership with CFAC, assessed the program's most significant outcomes and offered recommendations for future improvement. By providing CFAC with time, resources, and a framework to reflect on their process, the evaluation supports their efforts to meaningfully impact the food system and increase food access over the long term. Rather than starting from scratch next year, CFAC and their program partners have a clear, informed direction for moving forward based on previous experience and data on the program's outcomes—particularly outcomes such as dignity and self-confidence of low-income people, which are essential to building self-reliance but difficult to quantify. Moreover, the evaluation allows CFAC to adopt a "pollinator" role: by formally identifying their outcomes, CFAC and their program partners can share successes with other enterprises in the community, create more interest in the program and, in turn, support western Montana's local food economy. This element brings my portfolio "full circle" by demonstrating the importance of reflection for informing future design.

Conclusion

This portfolio concludes by reflecting on how each of the elements contribute to building a resilient local economy and, in turn, the "lasting, food system transformation" that Holt-Giménez (2010) calls for. I also ruminate on my significant areas of growth and learning through these projects, as well as how this work will support my future professional and personal endeavors.

Introductory Recap

The four enterprises represented in my portfolio are all pollinators aiming to build a resilient local economy in western Montana. From import substitution to the triple-bottom-line, they exemplify Shuman's principles of sustainable economic development in their values and actions. Already, they have contributed to "creating a healthy entrepreneurial ecosystem" in western Montana—a trend that will be furthered by more local and regional pollination. My portfolio's elements represent three distinct phases of the organizational "life cycle," and shed light on the equal value of design, implementation, and reflection in creating a sustainable pollinator enterprise. The first element, a business plan for Mirthful Farm, reveals the inner workings of a business's design phase. The second, two case studies of local cooperatives, examines the challenges and successes of the implementation phase. The third element, a program evaluation for Community Food and Agriculture's "Community Food Project," demonstrates my experience of the reflection and evaluation phase. In short, my portfolio shows how four pollinator enterprises are building a resilient local economy, and why all stages of the organizational "life cycle" are important in building sustainable pollinator enterprises.

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ELEMENT 1

Business Plan: Designing a Business that Enacts Core Values of the Alternative Food Movement

The following section contains work that I completed as part of the Fall 2017 – Spring 2018 “Pursue Your Passions” program, which supports female students’ exploration of entrepreneurship. My portfolio includes a list of primary activities I completed as part of this program, which supported the design of my business, Mirthful Farm. It also includes a business plan I wrote for Mirthful Farm, which I submitted as part of my application for the Spring 2018 John Ruffatto Startup Challenge.

As the business plan is a work in progress, this iteration simply represents a snapshot in time along a continuum of evolution (see Figure 2). The fact that this business plan remains a living, changing document reflects the larger importance of an organization or business taking ample time to build a robust design that deliberately incorporates core values while maintaining economic viability.

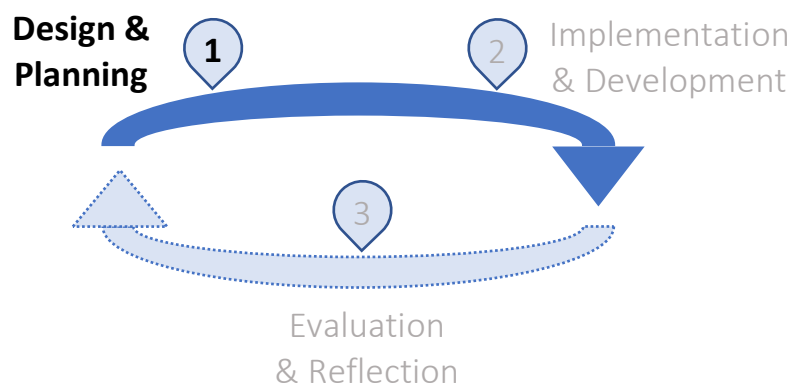


Figure 2. My portfolio’s first element, a business plan for Mirthful Farm, represents the design and planning phase for an organization.

List of Primary Activities Completed to Design Mirthful Farm

Over the past year, I have begun gathering many pieces of the knowledge and validation necessary for successful planning and launch of Mirthful Farm. Through this process, I have learned the importance and fun of asking questions, using the many resources available to me, and diving into a totally new and unfamiliar project. Below, I briefly describe the key components that I have completed. The date ranges during which I actively worked on each component are noted.

1. *August 2017-May 2018*: Participated in **“Pursue Your Passion,”** a program through UM’s Blackstone Launchpad designed to support ten female students in pursuing their entrepreneurial interests, whether or not they have a business background. As part of this, I attended a two-day retreat, twice-monthly, year-round accountability and business education meetings, monthly meetings with a personal business mentor, and networking events in Missoula’s business community.
2. *May 2017-May 2018*: **Talked with 20 farmers** about their experience of running an agricultural business and potential properties for lease or purchase.
3. *November 2017-May 2018*: **Visited real estate** of interest in Missoula, Lake, and Ravalli Counties, with properties ranging from farms to homes with acreage to bare land. As part of this, I worked with area realtors and loan officers from a number of loan providers.
4. *August 2017-May 2018*: Took **“Principles of Marketing”** and an **independent study on marketing** with Professor Jakki Mohr.
5. *February-April 2018*: Competed in the **Spring 2018 John Ruffatto Startup Challenge**. A selection committee chose eleven students statewide, including me, to pitch their business plan five times and receive feedback from 50 community entrepreneurs serving as judges for this full-day event. All eleven students then pitched their businesses to a live audience for large cash

prizes, with the first place winner receiving \$15,000 to put towards their business. This competition took place Friday, April 13, 2018. As a finalist, I won a \$1,000 cash prize.

6. *March 1, 2018:* Took an Alternative Energy Resources Organization (AERO) workshop on **“Growing Food Businesses: Opportunities Under Montana’s Food Law.”**
7. *January 2018:* Took **First Time Homebuyer’s class** at Homeward to learn about the land-buying process.
8. *October 2017-January 2018:* **Toured and spoke with owners of four pizza farms** in Midwest to learn about their experience, operations, and business side of running a pizza farm. I was **offered a managerial position** for the 2018 season at Cress Springs Bakery and Pizza.
9. *December 2017:* Met with a **Missoula County sanitarian** to learn about infrastructure and licensing requirements for Mirthful.
10. *November-December 2017:* Competed in the **Fall 2017 EPIC Pitch Competition**. A selection committee chose eight students, including me, to pitch their business idea in front of a live audience for small cash prizes, with the first place winner receiving \$1,500. I won the “Athena Award for the Most Outstanding Woman,” which included \$500.
11. *November-December 2017:* Held **two catered pizza events** to test a minimum viable product and refine costs.
12. *August-December 2017:* Took **“Sustainable Business Practices”** with Eva Rocke. Our class met with many area entrepreneurs about sustainable business practices, notably including Imagine Nation Brewing Company, who I later met with to learn more about their business design.

Business Plan for Mirthful Farm



Executive Summary

Mirthful Farm will flip the model of a conventional farm-to-table restaurant by putting the tables on the farm. We plan to grow and source sustainable, local ingredients, make wholesome, creative pizza with them, and invite you to the farm to enjoy it among friends and community. Mirthful has a focused mission of building community and a sustainable regional food system by exploring and addressing local environmental and social challenges.

Value Proposition

For Missoulians and visitors who love local food, the outdoors, and conviviality, Mirthful Farm beckons you (soon) to spread out your picnic blanket, kick back, be merry, and eat some imaginative, sustainable, and wholesome wood-fired pizza at our beautiful farm.

But we have a secret: Mirthful means more than pizza. *Mirth* means laughter and merriment, which tend to happen with good company and community. Mirthful Farm will be a place to build and support a joyful, diverse, and resilient community (with pizza as our facilitator for community building). Through on-farm workshops and events, Mirthful will explore social challenges in our community while celebrating arts, crafts, and good food. At the same time, community resilience tackles environmental challenges, which is why Mirthful will also contribute to a sustainable regional food system. Mirthful's commitment to enacting our values is what makes us special, and provides a new and different value for Missoulians. The fact that many Missoulians already identify with the community ideals that Mirthful embodies will make Mirthful a community mainstay.

Vision/Mission

We believe that our society's technology-oriented culture separates us from each other and the natural world, creating a lack of both awareness and motivation for us to be stewards for our communities and environment. Rekindling empathy for each other and our land is the lifeblood of community resilience. And, we think that a concoction of food, mirth, and togetherness makes the journey to community resilience a lot more fun.

Mirthful will practice and demonstrate the viability and deliciousness of sourcing sustainably produced, local food. Mirthful will also be a venue for community and conviviality, building collaboration and empathy into our social, environmental, and cultural systems.

Problem and Solution

Though Missoula's regional food system is quickly developing, there are too few venues to meet the demand for affordable, high-quality, farm-to-table restaurants. Rarer still are restaurants that offer the option for outdoor dining in a beautiful place while welcoming all. Rarest are restaurants that truly align their values with those of their customers and enact them meaningfully.

Mirthful Farm will address these needs head-on. We will grow and serve sustainable, local food while building community during pizza nights and other events. We will provide a beautiful venue where people can connect with each other, their environment, and their food system. This provides our customers with a sense of fulfilling their values by supporting sustainable agriculture, experiencing happy family moments, or simply having fun. What sets Mirthful apart goes beyond our menu. We are different because our end goal is to build community resilience and provide a space for people to gather, not to serve pizza. Rather, pizza is a means to our end goals.

Missoula is an ideal location for Mirthful. Enormous opportunity exists for new farm-to-table restaurants, which are scarce compared to Missoula's demand for local food. Mirthful will be the only dining venue in Missoula to prominently prioritize community and environmental sustainability. (We met with Imagine Nation Brewing Company to learn about how they fulfill their

mission while making a profit, and have applied many of their concepts.) Through customer surveys and profiling, we have early validation that many Missoulians share Mirthful's values and are willing to support us (see "Customer Segments").

More tangibly, Mirthful will add value by offering a barn for those more comfortable dining indoors and plenty of outdoor space for customers seeking a more picnic-like experience. Mirthful will be for casual and fancy alike, suiting all customers' preferences and dining occasions. As part of our initiative to be affordable and inclusive, we will welcome BYO beverages, appetizers, salads, and other picnic accompaniments (while offering local beverages and a weekly "cookie jar"). See Appendix A for feedback we have gathered on menus at two catered events.

Customer Segments

We will primarily serve B2C customers. We have profiled a few potential customer segments:

- One Missoulian, a strong supporter of local food and community, enjoys wood-fired pizza—which she often makes at home because she struggles to find restaurants that satisfy her needs. Her family would love a venue that offers a casual dining experience where her kids could run around while waiting for pizza. She appreciates versatile menus that satisfy everybody's taste buds. She is happy when her family doesn't have to break the bank to eat out, and therefore would be "psyched" about the option to bring her own beverages and sides.
- Another potential customer lives in Missoula and loves the outdoors. When not cooped up at work, she spends her days climbing in Kootenai Canyon. She tries to enjoy every possible minute outside. She would be excited about a restaurant where she can eat "a lot of good pizza, beer, and cookies" while catching the last sunshine or first stars of the evening.
- One interested patron, a semi-retired professional, is looking for a new venue that is good for celebrating occasions and giving his many visitors a memorable, unique dining experience.
- One couple living in Bonner are self-described foodies. They are on the hunt for new culinary adventures, which are limited here compared to their former home of Portland. They prioritize authenticity, freshness, and creativity on a menu. Being heavily involved in the Missoula community, they would be excited to dine and participate in workshops at Mirthful.

Channels

We will reach customers through a synergistic marketing plan designed to build and retain a solid customer base. The first step in laying the foundation is **building awareness through promotions and catering**. Our initial promotions will include tabling with samples at events such as farmers' markets, Out to Lunch, and First Friday. At these events, we will encourage people to opt in to our email list; the purpose of the emails will be to keep customers informed about events, deals, and happenings of Mirthful to encourage them to visit us. We will also maintain an **up-to-date online presence** including a website (which we need to buy the URL for), Facebook, and Instagram to build credibility as modern, legitimate, and accessible. **To gain catering clients**, we will begin with targeted personal outreach to businesses, organizations, and groups that frequently use catering and that support local food and businesses (for example, Runner's Edge and Sussex School, who have expressed interest in our product). In exchange for a discounted, catered event, we will ask people and organizations in our personal networks and who can reach our target markets to send information about Mirthful's catering offerings to their email lists. Examples include Community Food and Agriculture Coalition and Garden City Harvest, both of whom have expressed willingness to promote Mirthful. Using these channels will create awareness and initial revenue for Mirthful.

Once we have a permanent farm location, we will pursue additional communication and outreach strategies, beginning with an invitation-based **"farm warming" event** for local foodies, friends, and entrepreneurs who are embedded in the Missoula community. In our second year at the farm, we will grow this initial launch event into a larger, cross-promotional local food festival to solidify Mirthful's reputation as an exciting, dynamic part of the community. Our philosophy of **ongoing customer relationship management** places the customer experience at the center of our company to keep them returning to Mirthful. We will offer a rotating menu, customer appreciation discounts for a future visit, family or date nights, happy hour, and special events (e.g., candlelit artist feature night), and will regularly collect and respond to customer feedback. We are in the business of building community, and much of that work—and our brand—arises from positive, sincere, sustained relationships. A final strategy is to pursue cooperation with a range of **B2B partners**. Because Mirthful's success is tied to both its mission and its products, many types of

relationships could be created with B2B partners. For example, partnering with a nonprofit that shares our mission may include teaching an educational workshop at Mirthful. Another opportunity might be to work with a local brewery who supplies beer to Mirthful. The more Mirthful supports and collaborates with others in our community, the stronger our community (and Mirthful) will be.

Revenue Streams

Mirthful's diversified revenue stream will keep pizza prices accessible by charging a premium for events, workshops, and venue rental:

- Our first priority is building a minimum viable product (MVP) and initial revenue through **catering**. Using money won at the EPIC Pitch Competition, we have begun validating our MVP at two catered events, including one paying event. At both events, we collected customer feedback on flavors and what customers would be willing to pay for our products (see Appendix A), and began refining costs for a catering price model (see Appendix B). We recently toured the commercial kitchen we will rent before we have our own kitchen. We will continue to offer catering after Mirthful opens our farm location.
- **Pizza nights** at Mirthful will provide revenue from product sales, including: pizza, local beverages, and a "cookie jar." Our 16-inch "classic" pizza flavors will be priced at \$15-\$20, and "specialty" flavors at \$20-\$25. These prices are based on initial product testing to determine costs, surveyed catering customers' feedback (see Appendix A), other pizza farms' prices, area competitors' prices, and financial modeling (see Appendix B).
- Inspired by the popular Community Supported Agriculture (CSA) model, we will offer a **pizza subscription, or "CSP,"** which will provide upfront funding for initial and start-of-season expenses. CSP subscribers may choose a weekly, bi-weekly, or monthly "pizza pass" from April to October, and will benefit from unique rewards like a CSP member party.
- Our **events, workshops, and venue rental** will provide us with fees for use and customer service, as well as product sales from any pizzas purchased during events. For customers wishing to have pizza at their event, we will offer volume discounts.

Broader Economic Impact

Mirthful has a few obvious direct economic impacts. We will be a local, tax-paying business. We will employ roughly ten people (a mix of part-time and full-time employees), offer benefits, and pay a living wage starting at \$15 per hour. Our staff is likely to grow as Mirthful grows. While these direct impacts are meaningful, we see potentially even more value arising from secondary impacts that Mirthful will create in the Missoula community. Missoula's local agricultural scene is vibrant, with farms and CSAs contributing significantly to our local economy. To further this economic upswing, Mirthful will be a touchpoint between local producers and the Missoula community by purchasing and featuring local products. Furthermore, we anticipate local food and agriculture becoming a big part of Missoula's cultural identity. Mirthful can be central to furthering and highlighting this identity. Mirthful may become a recruitment tool for site selection, like Brennan's Wave or Caras Park—especially as people in high-tech, high-growth industries search for site locations that fit with their values, such as diversity and progressive social policies and actions (think Boulder, CO or San Francisco). Mirthful embodies these values.

After developing partnerships with entities such as Youth Court, Youth Harvest, Home Resource, and the Women's Shelter, we will also have a major secondary effect by addressing the poverty cycle, employing people who other businesses might not and giving them value through meaningful work, nutrition, and a sense of self-worth. Youth poverty costs the U.S. economy \$500 billion annually; giving people out of Youth Court a sense of value in the ways listed above is proven to be a significant economic boon for communities.

Finally, as a model for agri-tourism, a sector that has had significant economic impact in various locations across the U.S. and the world, we will lay the foundation for an entirely new sector of economic growth in western Montana. Through these measures, we will enhance the social fabric of western Montana, which is hard to quantify but essential to our local economies.

Key Activities

Mirthful Farm will engage in a few primary activities that will be relatively constant once we are fully operational, which will sustain our unique value proposition:

- Growing and procuring ingredients. Josh Slotnick, director of the PEAS Farm and co-owner of Clark Fork Organics, will provide technical expertise during Mirthful’s first farming seasons. We are building relationships with local farmers and suppliers, such as the Western Montana Growers Co-op, who we hope to purchase from.
- Preparing food for pizza nights and other events, including recipe development, menu planning, and ingredient preparation: harvesting, washing, processing, and dough preparation.
- Organizing and hosting community-building events, from local food festivals to artisan craft workshops to music nights to private gatherings and celebrations.
- Planning, managing, and maintaining Mirthful property for both aesthetic beauty and agricultural function. This requires building picnic tables, pavilion, barn, and other amenities.
- Strategic marketing (see “Channels” above).

The table below details primary activities during three main growth phases. **Items that have already been completed or are in progress are bolded.**

<i>Phase 0: Jan 2018-Feb 2019</i>	<i>Phase 1: Feb-Oct 2019</i>	<i>Phase 2: Oct 2018-Oct 2020</i>
Customer engagement	Fundraise: bank, investors	Buy land, if leasing in phase 2
Test recipes and costs	Lease/purchase land	Grow most ingredients
Cater pizza dinners	Develop basic infrastructure	Pizza nights 2x/week
Refine vision and financials	Produce some ingredients	Open venue for rental
Fundraise: crowdfund, investors	Procure most ingredients	Local food festival
Explore land & lease options	“Farm warming” event	Launch community programming
Build partners and mentors	Pizza nights 2x/week	Begin building barn June 2020

Key Resources and Partners

Our current team is Catie DeMets and Rudy Molinek, co-founders. Catie was a chef in Italy, where she fell in love with real Italian pizza. She learned food service at an acclaimed farm-to-table café in Madison, WI, and was a catering cook at the preeminent Wedge Community Food Co-op in Minneapolis. Outside of studying food democracy in the Environmental Studies Master's Program at UM, she worked at the PEAS Farm for two summers. She met Rudy, her fiancé, on a quest for the best pistachio gelato in Italy. Rudy is an educator, woodworker, gardener, and community activist. Our collective experiences and passion are the magic and heart of Mirthful Farm.

We have been investigating land options in the Missoula area since November. We are working with realtors at ERA Lambros and Mission Valley Realty, and have gone to see several properties in Missoula and Lake counties. We took a first-time homebuyers class at Homeward and met with loan agents at Stockman Bank and USDA's Rural Development Loan Program. We are looking into small agricultural business grants through USDA and other sources. We are also cultivating relationships with 15-20 local farmers, who are an excellent network when searching for agricultural land. We have talked with two farmers who are interested in leasing land to us for piloting a pizza farm this summer, and are working with a few other potential business partners.

After speaking with four owners of pizza farms and touring three pizza farms, we have determined that we will need at least 10 acres of land. For pizza nights, we will need a commercial pizza oven and hood, commercial kitchen, parking lot, restrooms, and picnic tables. We have begun a relationship with a Missoula County sanitarian, who we have met with to discuss infrastructure, procedures, and licensing we will need to comply with regulations as we grow our business. Our primary business mentors in Missoula include Molly Bradford, Jakki Mohr, Kristi Govertson, and Josh Slotnick. Two Midwestern pizza farm owners have provided expertise; one pizza farm offered us jobs for this season to gain experience. Blackstone LaunchPad has provided significant support. We have partnered with Christine Littig, founder of Red Bird Restaurant and former owner of Bernice's Bakery, who will advise us on operations, efficiencies, and financials before we open.

Financial Resources

Upon winning the Athena Award and \$500 at the EPIC Pitch Competition, we have put all of the prize money into developing and testing Mirthful's MVP. With the prize money, we bought pizza making and catering items including pizza stones, delivery bags, and boxes, and attended a conference called "Growing Food Businesses: Opportunities Under Montana's Food Law" to learn about regulations, procedures, and licensing. We plan to put the remainder of this money into a portable pizza oven that we can bring to catering events or towards a land deposit. **Please see Appendix B for details on our anticipated costs, funding, and other financials as we grow.**

Next Steps

We aim to lease land and launch pizza nights and events at Mirthful (Phase 1 in "Key Activities") this summer, while we work other jobs to build our startup funds. We are assembling a Kickstarter campaign to raise \$5000 for a mobile pizza oven, and will continue saving for a commercial kitchen, necessary basic startup equipment, and a land lease for this summer and farm purchase in 2019 or 2020. Currently, our most pressing to-do items are **building our startup funds** (see Appendix B for specific activities to achieve this), **refining our operations and financials**, and **building our customer base** through catering, promotions, and other strategies outlined in "Channels."

Appendix A. Sample menu and feedback

Menu and comments at two catered events:

Classic Pizzas

1: *Cherry tomato, mozzarella, basil*

- “Awesome taste for a simple pizza.”

2: *Italian sausage, mushroom, sage*

- “I love all the textures.”
- “Another great classic.”
- “Nice touch with the sage.”

3: *Potato, rosemary, fontina, smoked salt*

- “SO GOOD.”
- “Great subtle flavors.”



Specialty Pizzas

4: *Bitter greens pesto, Calabrese sausage, feta*

- “One of my favorites.”
- “I’m a fan.”

5: *Fried sweet onions, smoked paprika-infused olive oil, chorizo, cotija, cilantro*

- “This is definitely my favorite.”
- I’ve never seen a pizza like this, but I love it.”

6: *Roasted red pepper and prosciutto on arugula cream sauce*

- “Perfect!”

Did people like the pizza?

- “I’ve never tried a whole wheat-based crust that I liked, but you nailed this one! I love it.”
- “We love you guys!!!! You rock. Thank you for the delicious pizza!”
- “This was awesome. More than that, I think you can charge for the experience.”
- At the first catered event, **7 out of 7 people loved** at least two flavors.
- At the second catered event, **22 out of 23 people loved or liked** at least one flavor.

How much would people pay for a 16-inch pizza?

- Classic flavors: \$16-\$22
- Specialty flavors: \$20-25

Appendix B. Financials

Catering menu

Item	Price
Classic pizza flavors (10-inch)	\$9
Classic pizza flavors (16-inch)	\$18
Specialty pizza flavors (10-inch)	\$11
Specialty pizza flavors (16-inch)	\$22
Cookie jar (one dozen 3-inch cookies)	\$6
Beverages	Variable
Kitchen rental	\$15/hr
Travel Fee	\$0.55/mile
Service staff (set-up, clean-up, etc.)	\$18/hr
	<i>18% gratuity added to food and beverage items</i>

We recently received product price lists from Western Montana Growers Co-op (WMGC), from whom we will purchase many of our ingredients, and are integrating this into our financials as we refine our costs. While we have so far shopped at the Good Food Store, which offers a 10% discount for some items purchased in bulk but does not offer wholesale accounts, we are aiming to get a wholesale account with WMGC as Mirthful becomes better established. In addition, we are currently refining our prices to find the “sweet spot” for what Missoula will pay.

Costs

We have incurred \$300 so far, which was paid for by part of our \$500 prize at the EPIC Pitch Competition. As we validate our model through catering, we expect to invest \$6,000 in a mobile pizza oven, \$335 for retail establishment plan review and licensing fees, and \$100 in other business establishment fees (buying website domain, trademarking name, etc). We have modeled our financials for the fully operational pizza farm, but have not done so for catering, which we view as an opportunity to validate our model, refine operations and financials, and accumulate startup capital. Please see attached “**Capital Expenditures**” and “**Revenues and Expenses**” documents for our key cost components and operational and financial assumptions.

Key assumptions

In our financial modeling, the only products we included are 16-inch classic and specialty pizzas, as the model is meant to be illustrative and directional. Based on conversations with pizza farm

owners, we assume that products such as beverages, cookie jars, and 10-inch pizzas (which we can charge a premium for) will add significant profit without adding much cost. For instance, market research suggests that an average of two beverages are purchased per pizza and cookie jars will sell in the amount of 1/4 of pizzas sold. Based on recipe and cost testing, we expect to make \$3.25 on a beverage priced at \$5, and \$5 on a cookie jar priced at \$6. In a full-capacity month, if we conservatively assume our production capacity is 200 pizzas per night, this adds \$12,400 in additional profit per month. We also assume that our costs for most events and workshops will be low, resulting in a high profit margin. Please see **“Sales Activity,” “Cash Flow,” “Income Statement,”** and **“Balance Sheet”** for other financial assumptions (based on research and validation) like sales capacity, basic vs. premium sales, wages, capital expenditures, etc.

Stages of growth and development

Our three main business phases, as discussed in “Key Activities,” outline the main stages of growth we envision for Mirthful. These stages also correspond to the primary capital expenditures we will need to invest. While waiting to build the multi-functional barn will limit our revenue in Phase 1, the barn is not essential to Mirthful’s launch and will require additional capital, which we will save during Phase 1 so we can construct the barn as soon as possible, signaling the beginning of Phase 2. At this point, we expect to have expanded our capacity and operations significantly to serve a larger volume of customers. Our key performance metrics will include sales, but also number of workshops and events held and other metrics collected as we grow and refine our vision for what our community would like to see at Mirthful.

Funding

We will fund Mirthful through a wide variety of sources. In our financial model, we have set our owner contribution to \$60,000 for now, which we will reach through a combination of profit we make in our catering, savings from our regular jobs, and crowdfunding (and any winnings from this competition). We will also ask family for support, either through loans or contributions. We plan to apply for a 0% interest Kiva loan through Community Food and Agriculture Coalition’s Pitch Fest event next January, when we may be in a better position to pay it back. We also plan to apply for

various grants including: USDA's Rural Business Development Grants and Value-Added Producer Grants, Montana Department of Agriculture's Growth Through Agriculture grant, and others we will apply for with technical support from Lake County Community Development Corporation. Finally, as we are aiming to buy land with a home on it or build a home on the land we buy, we have already begun relationships with banks and lenders such as the USDA Rural Development Program, and plan to finance much of our land purchase through a traditional mortgage.

Risks

Our biggest risks in moving forward with Mirthful are:

1. On-farm startup costs are much higher than anticipated, or require unexpected expenditures related to infrastructure—such as well or irrigation-related issues. These are site-specific and we will attempt to mitigate these risks as much as possible with careful scoping and preparation.
2. We are not exactly sure what our market and production capacity will be. We will mitigate this risk with further market research and as much information and preparation as possible.
3. The location-based, rural nature of Mirthful requires people to travel farther than they otherwise might. While this has proven to be a non-factor at pizza farms across the Midwest, where a significant portion of the customer base is willing to travel 45 minutes to an hour to the farm, Montana may prove a different context. While preliminary customer surveying can provide some sense of people's willingness to travel, this is a difficult piece to validate before implementation, especially given that Mirthful's model is new and unfamiliar to the majority of Missoulians.
4. Given the high number of small, local farms in the Missoula region, many of whom are run by young, enterprising individuals, we may face competition from other entrepreneurs who already have a fully operational agricultural enterprise, putting us a bit behind in the process. It is unclear how many pizza farms the Missoula area could reasonably support. While this prediction is speculative, it is nevertheless an important risk to consider.

Capital Expenditures				
Item	Cost	Purchase Date	Useful Life	Notes
Phase 1				
Land	200000	Startup	30	20 Acres Undeveloped
Commercial Kitchen	15000	Startup	10	
Commercial Pizza Oven	7000	Startup	10	
Hoop House #1 (30'x100')	10000	Startup	15	
Greenhouse (10'x20')	5000	Startup	15	
Irrigation Well	10000	Startup	15	
Rain and Sun Pavillion	3000	Startup	10	
Total	250000			
Phase 2				
Multi-Functional Pole Barn	40000	Year Three	20	
Hoop House #2 (30'x100')	10000	Year Three	15	
Total	50000			

Revenues and Expenses			
Item	Amount	Frequency	Notes
Revenue:			
Selling Price:			
Basic 16" Pizza	\$18		
Premium 16" Pizza	\$22		
Number of Pizza Nights	8	Monthly	
Number sold	200	Per Pizza Night	
Total Pizzas	1600	Monthly	This is the figure used for capacity in the sales activity sheet.
Sales Percentage:			
Basic 16" Pizza	60%		
Premium 16" Pizza	40%		
Variable Expenses:			
Ingredients:			
Basic 16" Pizza	\$4	Per 16" pizza	
Premium 16" Pizza	\$8	Per 16" pizza	
Operating Expenses:			
Utilities	200	Monthly	
Property Tax and Mortgage Insurance	\$245	Monthly	
Insurance (Commercial general liability)	50	Monthly	
Fuel	300	Monthly	March through October, 1/2 otherwise
Supplies	500	Monthly	March through October, 1/2 otherwise
Marketing	250	Monthly	
Miscellaneous	100	Monthly	
Planting Expenses	1000	Monthly	Only in March and April
Accounting	300	Quarterly	
Salary and Wage Information:			
Rate	15	Hourly	
Hours	16	Weekly	
Number of Employees	8		
Payroll Tax %	18%		
Total Payroll Expense	\$9,062	Monthly	Only March through October
Owner Draw			
Year One	\$2,000	Monthly	Beginning in June of Year One
Year Two	\$3,000	Monthly	
Year Three	\$4,000	Monthly	
Owner Contribution			
	\$60,000		
Loan Information:			
Amount	\$200,000		
Rate	8%		
Term	30	years	
Payment	\$1,467.53	Monthly	
Property Tax	\$2,100	Annual	
Mortgage Insurance	\$70	Monthly	
Total Payment	\$1,712.53		
Tax Rates:			
Self-employment tax	15.30%		
Income tax	10%		

Sales activity												
Year One												
	January	February	March	April	May	June	July	August	September	October	November	December
Percent of Capacity	0%	0%	0%	50%	80%	90%	100%	100%	80%	50%	0%	0%
Pizza Sales:												
Basic 16" Pizza	0	0	0	480	768	864	960	960	768	480	0	0
Premium 16" Pizza	0	0	0	320	512	576	640	640	512	320	0	0
Revenue:												
Basic 16" Pizza	\$0	\$0	\$0	\$8,640	\$13,824	\$15,552	\$17,280	\$17,280	\$13,824	\$8,640	\$0	\$0
Premium 16" Pizza	\$0	\$0	\$0	\$7,040	\$11,264	\$12,672	\$14,080	\$14,080	\$11,264	\$7,040	\$0	\$0
Total Revenue	\$0	\$0	\$0	\$15,680	\$25,088	\$28,224	\$31,360	\$31,360	\$25,088	\$15,680	\$0	\$0
Year Two												
	January	February	March	April	May	June	July	August	September	October	November	December
Percent of Capacity	0%	0%	0%	75%	100%	100%	120%	120%	90%	75%	0%	0%
Pizza Sales:												
Basic 16" Pizza	0	0	0	720	960	960	1152	1152	864	720	0	0
Premium 16" Pizza	0	0	0	480	640	640	768	768	576	480	0	0
Revenue:												
Basic 16" Pizza	\$0	\$0	\$0	\$12,960	\$17,280	\$17,280	\$20,736	\$20,736	\$15,552	\$12,960	\$0	\$0
Premium 16" Pizza	\$0	\$0	\$0	\$10,560	\$14,080	\$14,080	\$16,896	\$16,896	\$12,672	\$10,560	\$0	\$0
Total Revenue	\$0	\$0	\$0	\$23,520	\$31,360	\$31,360	\$37,632	\$37,632	\$28,224	\$23,520	\$0	\$0
Year Three												
	January	February	March	April	May	June	July	August	September	October	November	December
Percent of Capacity	50%	50%	65%	90%	110%	110%	120%	120%	110%	75%	50%	50%
Pizza Sales:												
Basic 16" Pizza	480	480	624	864	1056	1056	1152	1152	1056	720	480	480
Premium 16" Pizza	320	320	416	576	704	704	768	768	704	480	320	320
Revenue:												
Basic 16" Pizza	\$8,640	\$8,640	\$11,232	\$15,552	\$19,008	\$19,008	\$20,736	\$20,736	\$19,008	\$12,960	\$8,640	\$8,640
Premium 16" Pizza	\$7,040	\$7,040	\$9,152	\$12,672	\$15,488	\$15,488	\$16,896	\$16,896	\$15,488	\$10,560	\$7,040	\$7,040
Total Revenue	\$15,680	\$15,680	\$20,384	\$28,224	\$34,496	\$34,496	\$37,632	\$37,632	\$34,496	\$23,520	\$15,680	\$15,680

	Year One												Year One Total	January			
	January	February	March	April	May	June	July	August	September	October	November	December					
Cash Flow																	
Starting Balance																	
Cash Injection	\$6,987																\$6,987
Loan	\$200,000																\$200,000
Revenues																	
Basic 16" Pizza	\$0	\$0	\$0	\$8,640	\$13,824	\$15,552	\$17,280	\$17,280	\$13,824	\$8,640	\$0	\$0	\$0	\$0	\$0	\$0	\$95,040
Premium 16" Pizza	\$0	\$0	\$0	\$7,040	\$11,264	\$12,672	\$14,080	\$14,080	\$11,264	\$7,040	\$0	\$0	\$0	\$0	\$0	\$0	\$77,440
Total Revenue	\$0	\$0	\$0	\$15,680	\$25,088	\$28,224	\$31,360	\$31,360	\$25,088	\$15,680	\$0	\$0	\$0	\$0	\$0	\$0	\$172,480
Total Cash In	\$260,000	\$6,987	\$4,275	\$15,842	\$25,549	\$36,243	\$46,270	\$52,238	\$54,191	\$50,341	\$33,960	\$29,247	\$432,480	\$24,535			
Cost of Sales																	
Basic 16" Pizza	\$0	\$0	\$0	\$1,920	\$3,072	\$3,456	\$3,840	\$3,840	\$3,072	\$1,920	\$0	\$0	\$0	\$0	\$0	\$0	\$21,120
Premium 16" Pizza	\$0	\$0	\$0	\$2,560	\$4,096	\$4,608	\$5,120	\$5,120	\$4,096	\$2,560	\$0	\$0	\$0	\$0	\$0	\$0	\$28,160
Total Cost of Sales	\$0	\$0	\$0	\$4,480	\$7,168	\$8,064	\$8,960	\$8,960	\$7,168	\$4,480	\$0	\$0	\$0	\$0	\$0	\$0	\$49,280
Gross Profit	\$0	\$0	\$0	\$11,200	\$17,920	\$20,160	\$22,400	\$22,400	\$17,920	\$11,200	\$0	\$0	\$123,200	\$0			
Operating Expenses																	
Total Payroll Expense			\$0	\$4,531	\$7,250	\$8,156	\$9,062	\$9,062	\$7,250	\$4,531			\$49,843				\$49,843
Property Tax and Mortgage Insurance	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$2,940
Utilities	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$2,400
Insurance (Commercial general liability)	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$600
Fuel	\$150	\$150	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$150	\$150	\$3,000	\$150	\$150	\$150	\$3,000
Supplies	\$250	\$250	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$250	\$250	\$5,000	\$250	\$250	\$250	\$5,000
Marketing	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$2,250	\$250	\$250	\$250	\$2,500
Miscellaneous	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$1,000	\$100	\$100	\$100	\$1,000
Planting Expenses			\$1,000	\$1,000									\$2,000				\$2,000
Accounting	\$300			\$300			\$300			\$300			\$1,200				\$300
Total Operating Expenses	\$1,545	\$1,245	\$2,645	\$7,476	\$8,895	\$9,801	\$11,007	\$10,707	\$8,895	\$6,476	\$1,245	\$1,245	\$71,183	\$1,545			\$71,183
EBITD	-\$1,545	-\$1,245	-\$2,645	\$3,724	\$9,025	\$10,359	\$11,393	\$11,693	\$9,025	\$4,724	-\$1,245	-\$1,245	\$52,017	-\$1,545			\$52,017
Depreciation Expense	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$347	\$4,167	\$347	\$347	\$347	\$4,167
EBIT	-\$1,892	-\$1,592	-\$2,992	\$3,377	\$8,678	\$10,012	\$11,045	\$11,345	\$8,678	\$4,377	-\$1,592	-\$1,592	\$47,850	-\$2,144			\$47,850
Interest Expense	\$1,333	\$1,332	\$1,332	\$1,331	\$1,330	\$1,329	\$1,328	\$1,327	\$1,326	\$1,325	\$1,324	\$1,323	\$15,940	\$1,322			\$15,940
EBT	-\$3,226	-\$2,925	-\$4,324	\$2,046	\$7,348	\$8,683	\$9,718	\$10,018	\$7,352	\$3,052	-\$2,916	-\$2,915	\$31,911	-\$3,437			\$31,911
Taxes																	
Self-employment tax				\$1,221						\$1,221			\$3,662	\$1,221			\$3,662
Income tax				\$737						\$737			\$2,210	\$737			\$2,210
Total Taxes				\$1,957						\$1,957			\$5,872	\$1,957			\$5,872
Operating Income	-\$3,226	-\$2,925	-\$4,324	\$89	\$7,348	\$8,683	\$7,760	\$10,018	\$7,352	\$1,094	-\$2,916	-\$2,915	\$26,039	-\$3,394			\$26,039
Investing and Financing																	
Capital Expenditures	\$250,000												\$250,000				\$250,000
Loan Principal	\$134	\$135	\$136	\$137	\$138	\$139	\$140	\$141	\$142	\$142	\$143	\$144	\$1,671	\$145			\$1,671
Owner Draw						\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$14,000	\$3,000			\$3,000
Total Investing and Financing	\$250,134	\$135	\$136	\$137	\$138	\$2,139	\$2,140	\$2,141	\$2,142	\$2,142	\$2,143	\$2,144	\$266,671	\$3,145			\$266,671
End Cash	\$6,987	\$4,275	\$162	\$461	\$8,019	\$14,910	\$20,878	\$29,103	\$34,661	\$33,960	-\$701	-\$4,713	\$24,535	\$16,565			\$24,535
Change in Cash	\$6,987	-\$2,713	-\$4,113	\$299	\$7,558	\$8,891	\$5,968	\$8,225	\$5,558	-\$701	-\$4,713	-\$4,713	\$24,535	-\$7,970			\$24,535

Cash Flow, cont.

	Year Two												Year Two Total	January	February
	February	March	April	May	June	July	August	September	October	November	December				
Starting Balance	\$16,565	\$10,852	\$3,740	\$3,465	\$10,690	\$17,915	\$24,641	\$34,534	\$40,425	\$41,150	\$35,438	\$24,535	\$29,725	-\$23,484	
Cash Injection															
Loan														\$0	
Revenues															
Basic 16" Pizza	\$0	\$0	\$12,960	\$17,280	\$17,280	\$20,736	\$20,736	\$15,552	\$12,960	\$0	\$0	\$117,504	\$8,640	\$8,640	
Premium 16" Pizza	\$0	\$0	\$10,560	\$14,080	\$14,080	\$16,896	\$16,896	\$12,672	\$10,560	\$0	\$0	\$95,744	\$7,040	\$7,040	
Total Revenue	\$0	\$0	\$23,520	\$31,360	\$31,360	\$37,632	\$37,632	\$28,224	\$23,520	\$0	\$0	\$213,248	\$15,680	\$15,680	
Total Cash In	\$16,565	\$10,852	\$27,260	\$34,825	\$42,050	\$55,547	\$62,273	\$62,758	\$63,945	\$41,150	\$35,438	\$237,783	\$45,405	-\$7,804	
Cost of Sales															
Basic 16" Pizza	\$0	\$0	\$2,880	\$3,840	\$3,840	\$4,608	\$4,608	\$3,456	\$2,880	\$0	\$0	\$26,112	\$1,920	\$1,920	
Premium 16" Pizza	\$0	\$0	\$3,840	\$5,120	\$5,120	\$6,144	\$6,144	\$4,608	\$3,840	\$0	\$0	\$34,816	\$2,560	\$2,560	
Total Cost of Sales	\$0	\$0	\$6,720	\$8,960	\$8,960	\$10,752	\$10,752	\$8,064	\$6,720	\$0	\$0	\$60,928	\$4,480	\$4,480	
Gross Profit	\$0	\$0	\$16,800	\$22,400	\$22,400	\$26,880	\$26,880	\$20,160	\$16,800	\$0	\$0	\$152,320	\$11,200	\$11,200	
Operating Expenses															
Total Payroll Expense	\$0	\$0	\$6,797	\$9,062	\$9,062	\$10,875	\$10,875	\$8,156	\$6,797	\$245	\$245	\$61,624	\$4,531	\$4,531	
Property Tax and Mortgage Insurance	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$2,940	\$245	\$245	
Utilities	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$2,400	\$200	\$200	
Insurance (Commercial general liability)	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$600	\$50	\$50	
Fuel	\$150	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$150	\$150	\$3,000	\$150	\$150	
Supplies	\$250	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$250	\$250	\$5,000	\$250	\$250	
Marketing	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$3,000	\$250	\$250	
Miscellaneous	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$1,200	\$100	\$100	
Planting Expenses		\$1,000	\$1,000									\$2,000			
Accounting			\$300			\$300			\$300			\$1,200	\$300		
Total Operating Expenses	\$1,245	\$2,645	\$9,742	\$10,707	\$10,707	\$12,820	\$12,520	\$9,801	\$8,742	\$1,245	\$1,245	\$82,964	\$6,076	\$5,776	
EBITD	-\$1,245	-\$2,645	\$7,058	\$11,693	\$11,693	\$14,060	\$14,360	\$10,359	\$8,058	-\$1,245	-\$1,245	\$69,356	\$5,124	\$5,424	
Depreciation Expense	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$6,833	\$569	\$569	
EBIT	-\$1,814	-\$3,214	\$6,489	\$11,123	\$11,123	\$13,491	\$13,791	\$9,789	\$7,489	-\$1,814	-\$1,814	\$62,522	\$4,554	\$4,854	
Interest Expense	\$1,321	\$1,320	\$1,319	\$1,318	\$1,317	\$1,316	\$1,315	\$1,314	\$1,313	\$1,312	\$1,311	\$15,801	\$1,710	\$1,712	
EBT	-\$3,136	-\$4,535	\$5,169	\$9,805	\$9,806	\$12,174	\$12,475	\$8,475	\$6,176	-\$3,127	-\$3,126	\$46,721	\$2,844	\$3,143	
Taxes															
Self-employment tax			\$1,787			\$1,787			\$1,787			\$6,582	\$1,787		
Income tax			\$1,079			\$1,079			\$1,079			\$3,973	\$1,079		
Total Taxes			\$2,866			\$2,866			\$2,866			\$10,555	\$2,866		
Operating Income	-\$3,136	-\$4,535	\$2,304	\$9,805	\$9,806	\$9,309	\$12,475	\$5,475	\$3,310	-\$3,127	-\$3,126	\$36,167	-\$22	\$3,143	
Investing and Financing															
Capital Expenditures												\$0	\$50,000		
Loan Principal	\$146	\$147	\$148	\$149	\$150	\$151	\$152	\$153	\$154	\$155	\$156	\$1,809	-\$243	-\$244	
Owner Draw	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$36,000	\$4,000	\$4,000	
Total Investing and Financing	\$3,146	\$3,147	\$3,148	\$3,149	\$3,150	\$3,151	\$3,152	\$3,153	\$3,154	\$3,155	\$3,156	\$37,809	\$53,757	\$3,756	
End Cash	\$10,852	\$3,740	\$3,465	\$10,690	\$17,915	\$24,641	\$34,534	\$40,425	\$41,150	\$35,438	\$29,725	\$5,191	-\$23,484	-\$23,528	
Change in Cash	-\$5,713	-\$7,113	-\$275	\$7,225	\$7,225	\$6,727	\$9,893	\$5,891	\$725	-\$5,713	-\$5,713	\$5,191	-\$53,210	-\$44	

Cash Flow, cont.

	Year Three												Year Three Total
	March	April	May	June	July	August	September	October	November	December			
Starting Balance	-\$23,528	-\$22,971	-\$23,621	-\$16,062	-\$8,503	-\$4,152	\$4,741	\$12,300	\$10,649	\$10,605			\$29,725
Cash Injection													
Loan													\$0
Revenues													
Basic 16" Pizza	\$11,232	\$15,552	\$19,008	\$19,008	\$20,736	\$20,736	\$19,008	\$12,960	\$8,640	\$8,640			\$172,800
Premium 16" Pizza	\$9,152	\$12,672	\$15,488	\$15,488	\$16,896	\$16,896	\$15,488	\$10,560	\$7,040	\$7,040			\$140,800
Total Revenue	\$20,384	\$28,224	\$34,496	\$34,496	\$37,632	\$37,632	\$34,496	\$23,520	\$15,680	\$15,680			\$313,600
Total Cash In	-\$3,144	\$5,253	\$10,875	\$18,434	\$29,129	\$33,480	\$39,237	\$35,820	\$26,329	\$26,285			\$343,325
Cost of Sales													
Basic 16" Pizza	\$2,496	\$3,456	\$4,224	\$4,224	\$4,608	\$4,608	\$4,224	\$2,880	\$1,920	\$1,920			\$38,400
Premium 16" Pizza	\$3,328	\$4,608	\$5,632	\$5,632	\$6,144	\$6,144	\$5,632	\$3,840	\$2,560	\$2,560			\$51,200
Total Cost of Sales	\$5,824	\$8,064	\$9,856	\$9,856	\$10,752	\$10,752	\$9,856	\$6,720	\$4,480	\$4,480			\$89,600
Gross Profit	\$14,560	\$20,160	\$24,640	\$24,640	\$26,880	\$26,880	\$24,640	\$16,800	\$11,200	\$11,200			\$224,000
Operating Expenses													
Total Payroll Expense	\$5,891	\$8,156	\$9,969	\$9,969	\$10,875	\$10,875	\$9,969	\$6,797	\$4,531	\$4,531			\$90,624
Property Tax and Mortgage Insurance	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245			\$2,940
Utilities	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200			\$2,400
Insurance (Commercial general liability)	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50			\$600
Fuel	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$150	\$150			\$3,000
Supplies	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$250	\$250			\$5,000
Marketing	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250			\$3,000
Miscellaneous	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100			\$1,200
Planting Expenses	\$1,000	\$1,000	\$300										\$2,000
Accounting		\$300											\$1,200
Total Operating Expenses	\$8,536	\$11,101	\$11,614	\$11,614	\$12,820	\$12,820	\$11,614	\$8,742	\$5,776	\$5,776			\$111,964
EBITD	\$6,024	\$9,059	\$13,026	\$13,026	\$14,060	\$14,360	\$13,026	\$8,058	\$5,424	\$5,424			\$112,036
Depreciation Expense	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569	\$569			\$6,833
EBIT	\$5,455	\$8,489	\$12,457	\$12,457	\$13,491	\$13,791	\$12,457	\$7,489	\$4,854	\$4,854			\$105,203
Interest Expense	\$1,713	\$1,715	\$1,717	\$1,718	\$1,720	\$1,722	\$1,723	\$1,725	\$1,727	\$1,729			\$20,631
EBT	\$3,742	\$6,774	\$10,740	\$10,739	\$11,771	\$12,069	\$10,734	\$5,764	\$3,128	\$3,126			\$84,572
Taxes													
Self-employment tax		\$3,235											\$11,492
Income tax		\$1,006											\$4,098
Total Taxes		\$4,241											\$15,589
Operating Income	\$3,742	\$2,533	\$10,740	\$10,739	\$7,530	\$12,069	\$10,734	\$1,523	\$3,128	\$3,126			\$68,983
Investing and Financing													
Capital Expenditures													
Loan Principal	-\$246	-\$247	-\$249	-\$251	-\$252	-\$254	-\$256	-\$258	-\$259	-\$261			-\$3,020
Owner Draw	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000			\$48,000
Total Investing and Financing	\$3,754	\$3,753	\$3,751	\$3,749	\$3,748	\$3,746	\$3,744	\$3,742	\$3,741	\$3,739			\$44,980
End Cash	-\$22,971	-\$23,621	-\$16,062	-\$8,503	-\$4,152	\$4,741	\$12,300	\$10,649	\$10,605	\$10,562			\$60,562
Change in Cash	\$557	-\$650	\$7,559	\$7,559	\$4,351	\$8,893	\$7,559	-\$1,650	-\$44	-\$44			\$30,836

Income Statement			
	Year One	Year Two	Year Three
Revenues			
Basic 16" Pizza	\$95,040	\$117,504	\$172,800
Premium 16" Pizza	\$77,440	\$95,744	\$140,800
Total Revenue	\$172,480	\$213,248	\$313,600
Cost of Sales			
Basic 16" Pizza	\$21,120	\$26,112	\$38,400
Premium 16" Pizza	\$28,160	\$34,816	\$51,200
Total Cost of Sales	\$49,280	\$60,928	\$89,600
Gross Profit	\$123,200	\$152,320	\$224,000
Operating Expenses			
Total Payroll Expense	\$49,843	\$61,624	\$90,624
Property Tax and Mortgage Insurance	\$2,940	\$2,940	\$2,940
Utilities	\$2,400	\$2,400	\$2,400
Insurance (Commercial general liability)	\$600	\$600	\$600
Fuel	\$3,000	\$3,000	\$3,000
Supplies	\$5,000	\$5,000	\$5,000
Marketing	\$3,000	\$3,000	\$3,000
Miscellaneous	\$1,200	\$1,200	\$1,200
Planting Expenses	\$2,000	\$2,000	\$2,000
Accounting	\$1,200	\$1,200	\$1,200
Total Operating Expenses	\$71,183	\$82,964	\$111,964
EBITD	\$52,017	\$69,356	\$112,036
Depreciation Expense	\$4,167	\$6,833	\$6,833
EBIT	\$47,850	\$62,522	\$105,203
Interest Expense	\$15,940	\$15,801	\$20,631
EBT	\$31,911	\$46,721	\$84,572
Taxes			
Self-employment tax	\$3,662	\$6,582	\$11,492
Income tax	\$2,210	\$3,973	\$4,098
Total Taxes	\$5,872	\$10,555	\$15,589
Net Income	\$26,039	\$36,167	\$68,983

Balance Sheet			
	Year One	Year Two	Year Three
Assets			
Current Assets:			
Cash	\$24,535	\$29,725	\$60,562
Total Current Assets	\$24,535	\$29,725	\$60,562
Fixed Assets:			
Phase One	\$250,000	\$250,000	\$250,000
Phase Two		\$50,000	\$50,000
Accumulated Depreciation	\$4,167	\$11,000	\$17,833
Total Fixed Assets	\$245,833	\$289,000	\$282,167
Total Assets	\$270,368	\$318,725	\$342,728
Liabilities and Owners' Equity			
Liabilities			
Current Liabilities	\$0	\$0	\$0
Total Current Liabilities			
Long Term Liabilities	\$198,329	\$196,520	\$259,540
Total Long Term Liabilities	\$198,329	\$196,520	\$259,540
Total Liabilities	\$198,329	\$196,520	\$259,540
Owners' Equity			
Owner Contribution	\$60,000	\$55,000	\$55,000
Owner Draw	-\$14,000	-\$36,000	-\$48,000
Retained Earnings	\$26,039	\$48,205	\$81,188
Total Owners' Equity	\$72,039	\$67,205	\$88,188
Total Liabilities and Owners' Equity	\$270,368	\$263,725	\$347,728

ELEMENT 2

Co-op Case Studies: Developing a Robust Cooperative Model through Trial, Error, and Success

The following section contains reports that I wrote based on research I completed for two case studies of regional cooperatives, in partnership with Lake County Community Development Corporation (LCCDC). Together, these case studies shed light on the growing pains and newfound opportunities of the implementation and development phase (see Figure 3):

MONTANA POULTRY GROWERS COOPERATIVE

From January to August 2017, I partnered with LCCDC to conduct a case study of the Montana Poultry Growers Cooperative's (MPGC) poultry processing facility. The facility, one of the first cooperatively owned and managed poultry processing facility in the U.S., was completed and certified for processing in December 2015. Based on my research, I wrote a report for LCCDC, which is published on their website and is included here. I have also included the article I wrote for *USDA's Rural Cooperatives Magazine* about the MPGC and their processing facility. Finally, I have included two unpublished interview guides I created for this case study.

TRIPLE DIVIDE ORGANIC SEED COOPERATIVE

From December 2017 to March 2018, I partnered again with LCCDC to conduct a case study of Triple Divide Organic Seed Cooperative and their development over time. After interviewing all eleven members of the co-op and analyzing the results, I wrote a report for LCCDC, which is published on their website, and which was distributed at the 2018 Montana Cooperative Summit. I have included the report here. I have also included the unpublished interview guide I created for this case study.

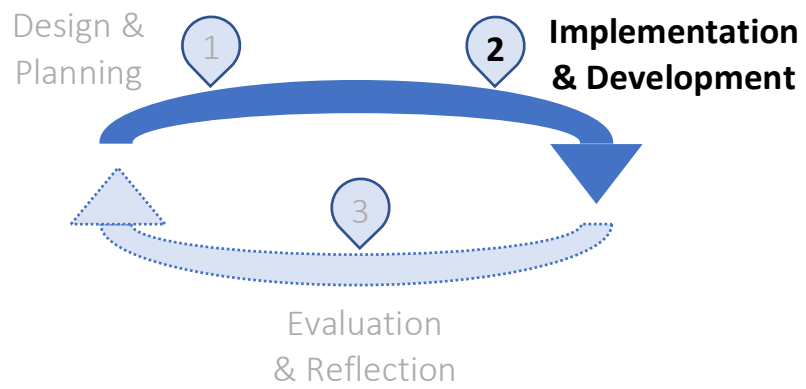


Figure 3. My portfolio's second element, two case studies of regional, agricultural producer co-ops, sheds light on the implementation and development phase for an organization.

Montana Poultry Growers Co-op Report for Lake County Community Development Corporation



Building a Local Poultry Economy: Lessons Learned

A Case Study on the Montana Poultry Grower's Cooperative and the Cooperative, Small Scale, Inspected Poultry Processing Plant



Lake County Community Development Corporation
Cooperative Development Center
August 2017

By Catie Demets, University of Montana

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Montana Poultry Growers Coop Case Study

Introduction

The Montana Poultry Growers Cooperative (MPGC) was established in 2006 to provide shared resources that support poultry production and processing and, in turn, help develop the state's local food economy. Until 2015, the co-op's primary functions were collective feed orders and three sets of shared-use processing equipment. In late 2015, with financial support from the Montana Department of Agriculture's Growth Through Agriculture program and the Montana Farmers Union, the co-op began construction of a small poultry processing facility in Hamilton, Montana, which is now open for use by co-op members. While the previous functions of the co-op remain significant services for members, the facility alleviates a bottleneck in Montana's local poultry industry by providing the state's first and only multi-user poultry processing facility under inspection. This research explores the primary challenges for poultry growers before the facility's existence, barriers during construction of the facility, and assets for the MPGC in overcoming those barriers. This report summarizes research and results of in-depth interviews with co-op members and key partners, points out key lessons learned through the process of cooperatively establishing a facility, and discusses some next steps for the MPGC. The aim of this report is to be shared with co-op members and partners, as well as others interested in establishing a rural, cooperatively owned poultry processing facility.

A Brief History of the Montana Poultry Growers Cooperative

The MPGC was established in 2006, with six poultry growers comprising its membership. Originally, they came together to meet a few key needs for poultry growers in Montana, a state which poses many challenges for producers due to long distances between population centers and lack of existing infrastructure for poultry production. As a new cooperative, members invested in two key services. First, they developed a collective feed ordering service, which allowed them to buy feed in bulk at dramatically reduced prices. Second, over time, they purchased three sets of shared-use processing equipment. These were distributed to three relatively central locations around Montana (Ronan, Great Falls, and Livingston) to enable members to access equipment that was fairly close to them. Members could rent the equipment and either transport their birds to the farm that housed the equipment for processing or bring the equipment to their own farm for processing. This equipment provides a relatively easy and flexible option for members who want to process their birds for personal consumption. The shared-use equipment is not, however, a viable choice for growers hoping to increase their production and sell birds because it does not qualify for an inspection exemption, which would permit them to sell to some limited markets.

In order to address this need, the MPGC received a grant in 2007 to pilot a mobile processing unit that could travel around the state to members' farms for processing. The mobile unit allowed producers with a limited number of birds to process under the 20,000 bird exemption, enabling producers to sell their birds. Under this exemption, up to 20,000 total birds per year processed in the mobile unit could legally be sold. By definition, the exemption signified that a state poultry inspector came quarterly to inspect the facility, but was not present during every processing event. On the other hand, a processing facility designated as "state-inspected" indicates that a state poultry inspector is present during every single processing event. This distinction is what separates all "state-inspected" birds from "exempt" birds for saleable purposes. Most commercial buyers have policies allowing only state-inspected poultry; thus, even though the exemption enabled growers to legally sell their birds at farmers markets and other direct sales to

Montana Poultry Growers Coop Case Study

individuals, the mobile unit did not provide a truly viable model for growers hoping to expand their enterprises significantly.

Even so, the mobile unit provided an important function for home-scale and micro-industry poultry growers as a point of entry. Unfortunately, it experienced significant wear due to inefficiencies in cleanup, individual use by a combination of experienced and inexperienced poultry growers, and most substantially, the long distances—up to 500 miles one way—that it had to travel between user-members across the state. As a result, the mobile processing unit was eventually dismantled in 2012. Although it proved not to be viable for serving a statewide membership, MPGC members and partners discussed the potential for this model to be used in more densely populated, geographically limited contexts. The retirement of the mobile unit left a significant gap in processing options for MPGC members and other poultry growers around the state. MPGC members and partners came together to fill this gap and, through the creation of a brick and mortar processing facility, opened new possibilities for establishing a local poultry economy.

The Processing Facility

In 2014, three poultry growers in the Bitterroot Valley, each seeking to expand their poultry operations, banded together to find a way to build a facility that more than just a single poultry grower could legally use. At that point, state law said that a state-inspected facility must be owned by a single entity, who must also be the sole user. Whereas the mobile unit's exempt status was not ideal for creating market opportunity, the exemption did allow for multiple producers to use the facility; this was not the case for a state-inspected facility. There was no specification regarding the owning entity, so the growers proposed that if MPGC was the entity who owned the facility, any member of MPGC would then be legally entitled to use the facility. This was essential not only because it would enable the processing of more birds for legal sale to wholesale and retail markets, but also because the cost for a single poultry grower to build a facility was prohibitive.

Cooperative ownership of a poultry processing license had never been tried in Montana, so the legal details required significant discussion with the state's Department of Livestock. Once they agreed that this licensing procedure was legal, the MPGC worked with Jan Tusick, director of the Cooperative Development Center at the Lake County Community Development Corporation (LCCDC), to secure funding for a facility. The co-op drew from a variety of funding sources to build the facility. First, they raised roughly \$20,000 through a Kickstarter campaign, and subsequently received funding from the Montana Farmers Union and a Growth through Agriculture grant from the Montana Department of Agriculture. In all, the MPGC raised the necessary funds, which amounted to roughly \$120,000. The facility was built at Homestead Organics Farm, near Hamilton, within an hour's drive from some of the main facility users' farms. MPGC members designed and built the facility according to their needs and the space available. They began construction in November of 2015 and the facility was certified for processing by July of 2016.

The processing facility is only 48' by 24', but it is efficient: a staff of five to seven people can process up to 400 birds per day (staff expect this number could be 500, but this has not been tested yet). The facility is HACCP-certified (Hazard Analysis and Critical Control Points), and there is an on-site state meat inspector from the Montana Department of Livestock present on each processing day—meaning that growers can sell their birds both wholesale and to direct markets with a label indicating that the poultry

Montana Poultry Growers Coop Case Study

was processed in a fully state-inspected facility. Adjacent to the facility is a commercial kitchen, which the MPGC does not currently use. In coming years, however, the MPGC hopes to get the kitchen HACCP-certified so they can further process their poultry. Currently, members only sell whole birds, while most customers prefer cut birds. The facility is certified to process any type of poultry, and could become certified to process rabbits in the future. With only a partial season in 2016, the facility processed over 6,000 birds. In 2017, the MPGC expects that the facility will process double to triple that amount. For comparison, this is slightly more than the number of birds processed by the current largest single-user processing facility in Montana, which is owned by the New Rockport Hutterite Colony in Choteau.

Project Background

This processing facility is important for a variety of reasons. Most significantly, it addresses a critical processing need for poultry growers who were looking to expand their operations to serve new markets, but previously had no economically viable place to process more than a homestead-scale number of birds. In pursuing and confirming the legality of a cooperative owning an inspection license for a facility, MPGC also provides a new model for pooling resources to create economic opportunity for small growers. Finally, the process of designing and constructing a small facility means there is a readily available blueprint for other growers who are looking to build a facility, but do not have the technical resources to do so.

Given the unique nature of this facility, the researcher spoke with MPGC members and key partners to document the challenges and assets for the MPGC in establishing the facility, as well as their personal experiences and lessons learned in spearheading this project. These members and partners participated in individual in-depth interviews averaging an hour in length. In total, over nine hours of interviews were conducted with nine participants from central and western Montana. They shared information based on a variety of questions, including: *Why was the processing facility needed? What challenges did the MPGC face in establishing the processing facility, and how were they navigated? What assets did the MPGC draw from throughout this process? What is the MPGC's larger role in building Montana's local food system?* The following section highlights key lessons and observations learned from these interviews.

Key Lessons and Observations¹

The Processing Facility Expands Economic Opportunities

All nine participants cited the lack of a publicly available, state-inspected poultry processing facility as a major barrier to their expansion. One poultry grower described his experience without a facility as the sole obstacle to pursuing poultry production: “We wanted to start a restaurant and grow all the meat for the restaurant, but there was no place to process the chicken...we could not overcome that part. The closest place we could have chickens processed was an eight-hour drive one way, so that was not going to work.” For poultry growers, the lack of a processing facility created a bottleneck in the production chain, wherein the lack of practical processing options (outside of the homestead scale) deterred new potential growers from starting poultry enterprises. For existing poultry growers, this void severely limited the economic feasibility of scaling up their businesses, ultimately preventing it from becoming a viable market in Montana—even at a time when local food sales in the region were increasing.

In discussing the facility in Hamilton, participants pointed to a variety of benefits, from the facility as an employer for community members to its flexibility for different user groups to its HACCP certification. Most salient was their belief that it would spur new activity in the poultry market, for both new growers and existing growers hoping to expand their operations. Though the extent to which this occurs on a regional scale remains to be seen, the fact that three MPGC growers have been able to either start or expand their operations as a direct result of the facility and ten new members have joined MPGC specifically to use the facility suggests high potential for the expansion of economic opportunity for poultry growers in coming years.

There is Power in Numbers

Participants frequently talked about the importance of “the group” over the individual in building the processing facility. In a state as large, rural, and sparsely populated as Montana, this group mentality—and pooling of resources to create economic feasibility in poultry production—was essential for the survival of poultry growers. In the early phase of the facility, participants often described the group as the primary impetus for undertaking the project. One member expressed this by saying, “We’re really thankful that it all came together this way. We’re thankful that the co-op...had a functioning group that was supportive. That’s what we feel helps drive [the processing facility]. The people.”

“The group” also provided leverage in the regulatory world. Participants commonly discussed the historical lack of any regulatory mechanism or support for a multi-user facility in Montana. Because of the unique human resources that the MPGC had access to, such as a cooperative development specialist and a meat inspector who advocated for the MPGC, the co-op provided a way to “interface with the regulatory world” with greater weight, credibility, and accountability than an individual might have had. One participant shared his thoughts on leveraging collective power to overcome regulatory barriers: “The poultry growers came together as a group. That’s the biggest barrier...They may have had some power to get people motivated because they were a group, so they were able to motivate folks, raise capital, get access to legislators, and interact with regulators.”

¹ Note: For a complete list of the challenges and benefits cited by interviewees, see the Appendix.

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And Motivated Individuals are the Catalyst

The progress of the MPGC in this project was driven by support from a few key players. From the perspective of those members who were most involved in the facility's building, a state meat inspector was one of the most important assets to the co-op. As one participant described, "[He] was the guy that kept coming over and saying, 'good job, keep going, keep going, you're doing that wrong, keep going'... We wouldn't have been successful if he hadn't helped us." The cooperative development director was also identified repeatedly as an essential supporter of the project. Participants were clear and consistent in their conviction that these key individuals' encouragement and support of the MPGC was central to the facility's success.

While there was consensus around two particularly critical actors in the project, as described above, many participants pointed to others as "key individuals" in catalyzing the project. In this way, nearly every participant was acknowledged by another as critical to the MPGC's success, past or present. This sense that individual actors carried the facility's success was striking and seemed to cultivate a collaborative spirit and respect for everyone in the MPGC not only as members, but also as individuals with knowledge and experience to contribute to its future.

The Co-op Structure is a Challenge and a Boon

The membership and policy structure and variable levels of member engagement with the co-op have proven challenging for the MPGC. While some members are thrown into positions of high commitment, others are minimally involved—either by choice or because they are too far away, geographically, to fully participate. At the same time, developing co-ops are ever-evolving in membership responsibilities. While a cooperative development agent or advisor may play a central role in the co-op at first, their role should taper over time as the roles and responsibilities of co-op members and managers develop. This transition can be tumultuous for a small co-op. For the MPGC, this was compounded by the fact that most, if not all, co-op members are full-time poultry growers with little or no spare time to devote to an involved position in the co-op or the dissemination of key updates and information on the co-op. Even for members who want to be more involved, they are often confused by the structure of the co-op, including such details as board responsibilities, financials, membership policies, and a wide variety of services for members.

Even so, the structure provides a variety of unique benefits that outweighed the challenges, in the eyes of participants. Significantly, many grants are designated specifically for cooperatives. In the case of the MPGC, the processing facility would not have been possible without such grants. The structure also supports democratic decision-making, giving members direct control over important issues such as (for the MPGC) compensation for facility employees, facility location, membership policies, board governance, and the mission of the co-op. Finally, its policies regarding board term limits mean that the co-op is an ever-evolving and organic organization driven by membership. The specific challenges and benefits undoubtedly vary from co-op to co-op, but in the case of the MPGC, participants considered the co-op's many benefits to outpace its drawbacks—particularly as they looked towards the co-op's "wide open" future.

Participation Fulfills Personal Values

The widely held feeling that everyone was a contributing and active member of the MPGC, especially during construction of the facility but also in the earlier history of the co-op, also translated to a more personal sense of value. One participant, in deliberating his personal motivations for growing poultry, expressed a belief that small-scale poultry, in combination with other farming operations, has the potential to transform our food system, and further, that the MPGC is well-positioned to educate the public about why they should buy sustainably grown poultry: “People will pay more if they really feel like they’re getting something different and more valuable, and the way to do that is to not try to do a more ethical version on a large scale. It’s to completely eschew the large scale and integrate and collaborate to make the smaller, radically different system work.” This sense of a personal ability to affect change to their food system reflects a feeling that all participants expressed to varying degrees.

In discussing the importance of creating the facility to be owned by the MPGC, this same sense of efficacy manifested itself among participants. Oftentimes, it appeared as a sense of pride and ownership in belonging to the MPGC. One participant’s reflection on the importance of the MPGC was deeply laced with this: “The idea of doing something together has a lot of benefit, if for no other reason than just having the correct mentality that a rising tide floats all boats...I think it’s a good model for how working together has benefit, instead of trying to do everything as individuals...The co-op, and the processing facility, is one small step in changing the world.” Participants felt that the MPGC is doing something novel and truly meaningful, in terms of its potential for developing a stronger local poultry system. The feeling of personal and cooperative pride—that “we did it” and “we can do it”—is palpable.

Next Steps

Potential next steps for the MPGC emerged from the researcher’s synthesis of interview results.

- *Marketing and education campaign:* While some co-op members feel that the co-op’s primary role as supporting the production of poultry should remain limited to this, others feel that members would benefit significantly from a marketing and/or education campaign in terms of market share. This campaign might help inform consumers regarding the product differences between conventionally and sustainably raised poultry, and why the prices for MPGC poultry are correspondingly higher. While members currently sell their poultry under their personal farm labels, some members are interested in tackling a larger marketing effort to create a MPGC brand, under which name members could sell their poultry. This would serve to build the reputation of producers and the MPGC, as well as strengthen marketing efforts, particularly for members who do not emphasize marketing for their own individual products.
- *Serving members equitably:* Equitable service for members is essential for its survival. Many members feel well-served by the co-op, while others feel that they do not have a strong voice in the co-op. Some members feel that the pricing structure for using the processing facility, while necessary at this point for the co-op in order to cover their costs, will exclude most members from using the facility in coming years. Some members expressed concern that the current pricing structure will exclude small (50-100 birds per year) growers who are interested in maintaining or slightly expanding their levels of production, but who do not wish to run a “full-on poultry business.” Some

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members in central and eastern Montana feel underserved by the co-op, whose activities have recently been largely focused in the western part of the state. While they expressed that they understood the necessity of this, some members felt that dividing into two different co-ops, or branches of the co-op governed by different boards and with separate member activities, serving different geographic regions of the state would help members in central and eastern Montana feel more empowered to meet their own unique needs.

- *Clarifying structure and roles:* Co-ops follow specific guidelines in terms of their structure and member roles (e.g., president, treasurer, board member). As the MPGC has so far focused its attention on member services, fiscal management, and operational policies, membership policies and procedures (e.g., non-compete clause, growth plan) have not yet been developed. As the co-op grows, it is essential for them to discuss and establish these policies to maintain clarity, order, and equity for their members.
- *Facility staffing:* Many participants touched on the difficulty of finding employees for the processing facility. This challenge arises from the fact that the facility currently operates only one day per week from May to November, which has proven too irregular a schedule to be attractive for most people seeking employment. Simultaneously, due to a statewide shortage of meat inspectors, the Department of Livestock can currently only allocate a meat inspector to the facility for one day per week. Since one meat inspector must always be present during butchering days, the facility is limited to processing only one day per week until there are more state meat inspectors available. As the facility aims to increase processing capacity, addressing this issue will be vital.

You can learn more about the Montana Poultry Growers Co-op at <https://mtpoultrycoop.com/> . Also, you can find more information about the Lake County Community Development Corporation at <http://www.lakecountycdc.org/> .

This report was researched and written by Catie DeMets, Masters Student in Environmental Studies at the University of Montana, Missoula, MT, in collaboration with Lake County Community Development Corporation's Cooperative Development Center.

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Appendix: Summary of Results

Table 1. The following table distills the key challenges that the MPGC faced before and during the facility's construction, as well as ongoing challenges:

Type of challenge	Specific challenge
Processing, before facility	
	Lack of facility
	Lack of desire to do own butchering
	Lack of butchering experience
	Mobile unit not economically viable
Distance	
	Mobile unit transportation and design challenges
	Lack of access to equipment and feed delivery locations for some producers
	In-person co-op meetings difficult to attend for faraway members
	Feeling of disconnectedness/hard to share experiences and collaborate
Individual producer	
	Lack of funding/regulatory leverage to build personal facility
	Seasonality
	Predators
	Inefficiency (scale)/lack of capacity
	Cost:
	...of organic (practices, certification)
	...of sustainably raising poultry (poultry takes longer to be ready for slaughter)
	...of products (feed, OG and non-OG)
	Lack of experience in poultry production
	Labor-intensive
	Poultry transport to facility
Marketing and education	
	Competition (Hutterites and conventionally produced poultry)
	Lack of consumer education on prices/product differences
	Organic costs and consumer stigma against non-organic products
	More growers needed to support a more viable local poultry network
Regulatory	
	Inter-agency discrepancies ("gray zones") and interpretation differences of law
	Lack of regulator familiarity with new licensing laws and poultry production
	Top-down attitude/one-way line of communication (regulator to grower)
	Inspector shortage
	Agency orientation towards industrial-scale production
	Timeline/cumbersome order of regulatory processes
Financial	
	Irregularity in flow of funds for facility during building
	High cost of facility
Construction of facility	
	Septic upgrade
	Difficult to design a custom facility with no previous models or examples
Facility	
	Staffing of facility (experience, availability, and labor cost)
	Inspector shortage
	Cleanup the same no matter how many birds
	No self-use of facility

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	High time commitment for managers
	Requires advance planning to schedule a time to have birds processed
	Added expenses for property owner
	Not profitable if too small of a grower
	Need a highly motivated group to take initiative on facility
	Only whole bird processing
	What to do with excess offal?
	Ironing out procedures and best practices
Cooperative structure	
	Unclear responsibilities
	Low engagement by many (lapse in leadership, i.e., "fumbling of the baton")
	High commitment by few (especially property owners and management)
	Unclear setup (structure, rules, membership, financials, membership policies)
	Many different functions (spread too thin geographically and functionally)
	Pricing structure not necessarily conducive to small grower profitability
	Fractured membership (lack of unity)
	Too young to determine whether facility will be profitable long-term

Table 2. The following table summarizes the key assets and benefits for the MPGC before and during the facility's construction, as well as into the future:

Type of benefit	Specific benefit
Membership	
	Shared use equipment
	Collective feed ordering
	Mobile unit
	Processing facility for all
	Democratic decision-making (right to a vote)
Personal fulfillment	
	Living/fulfilling personal values via sustainable poultry production
	Sense of efficacy/self-reliance/can-do attitude
	Sense of ownership/co-op pride/loyalty
	Desire for transparency and good product
	Values many perspectives
	Building personal community
Regulatory, before facility	
	Ensures growers follow best food safety practices in all processing environments
	Exemptions provide alternative to processing at state-inspected facility
Regulatory, for facility	
	HACCP certified means consistent and safe products
	All poultry processed at facility is state-inspected and labeled
	Facility is small enough for inspectors to see whole process
Collaborative advantage	
	Support from key members and partners
	Forum for sharing experiences and pooling expertise
	Group coalescence around common needs
	Community investment in co-op success
	Sharing ideas/deliberation/highly receptive to feedback
Cooperative structure	

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	Unique financial access:
	...Co-op-specific grants (MT Farmers Union, MT Dept. of Ag's Growth through Ag)
	...Cost sharing
	...Fair wages for facility staff
	...potential for OG certification
	Increased efficiency through:
	...Bundling of birds (supports small growers)
	Ability to become legal (MPGC owns inspection license)
	Democratic decision making
	High individual commitment:
	...via MPGC member finance
	...via investment of time
	Community orientation/mission-controlled organization:
	...via membership open to all
	Elected board governance
	Buffer between regulatory and individual (offers education for both entities)
	Addresses individual and common needs
Improves reputation	
	Humane raising and kill
	Potential for PGC brand marketing
	Easy venue for supporting consumer education
	Access to niche markets
	Publicity
	Transparency/connection to grower/accountability
	Website (generally advertising)
Facility	
	Economic opportunities:
	...Job creation for facility employees
	...Regional food system development (i.e., "local first")
	...Regional economic development
	...Will be certified organic
	...increasing capacity/opportunity for poultry growers
	...can sell direct or wholesale, frozen
	Flexibility for multiple user groups:
	...chickens, turkeys
	...organic and non-organic
	...kitchen for potential further processing in future
	Convenient to process/growers do not have to process their own birds
	Self-contained, stationary processing facility
	Closer to significant population of current poultry growers
	Replicable/"inspiration"/footprint
	Provides supply of sustainable poultry
Growing poultry	
	Poultry easy to grow compared to other livestock
	Cheap inputs
	Small acreage required

Co-op Member Interview Guide for Montana Poultry Growers Co-op Report

Before interview: Make sure to check recorder, and to have extra batteries.

Introduction: Thanks so much for agreeing to participate in this interview. These interviews are central to a study I'm doing with Lake County Community Development on the Poultry Growers Co-op's new poultry processing facility and members' perceptions of it.

More specifically, I'm trying to learn about what co-op members, like you, see as the challenges and successes of setting up the processing facility to be part of the co-op. I'm also interested in talking with you about some of your experiences being a co-op member.

Before we get started, I want to let you know that your identity as a participant in this study will remain confidential. Your name won't be used in any presentations or written reports. And, if at any time you decide you don't want to be included in the study or would prefer for me to omit any information you share, feel free to get in touch with me.

I also want you to know that we'll be publishing a report on this research, hopefully in the spring or summer, and we'll be sure to let you know when it is available in case you'd like a copy.

Do you have any questions before we get started?

If it's okay with you, I'm hoping to record our interview to ensure that your views are accurately recorded, and it lets me to focus on our conversation. Is that okay with you?

IF YES, TURN ON RECORDER AND PRESS RECORD. If no, prep to take notes.

Background and involvement: Let's start with a little background about you and your involvement with the co-op.

1. I'm wondering if you would tell me a little bit about yourself. How long have you been farming?

Probe (as needed): How long have you been raising poultry?

Probe: Does your farm or ranch focus on poultry or do you have other enterprises?

Probe: What are they?

2. What challenges has your own farm faced in growing poultry in Montana?

Probe: Have there been any other challenges for your farm in growing poultry?

3. How have you processed your birds prior to this facility?

Experience of building and using the facility: Since you're a member of the co-op, I'm interested in your perspective on the co-op's process of establishing the processing facility and processing birds there.

4. Were you involved in deciding to build it? (If yes) How?

Probe: Ask "would you tell me more about that?" when appropriate.

5. Why is the processing facility needed?

Follow up (if needed): Why was the decision made to build this facility?

6. What challenges, if any, has the co-op had to overcome in creating the facility?

Probe: Have there been any other challenges in this process?

Probe: How has the co-op been able to address these challenges?

7. What has been your experience using the facility?

Probes (as necessary):

- *How often did you process birds there in 2016?*
- *How many birds have you processed at the facility?*
- *Has the processing met your needs?*
- *Is it easy to get access to it or sign up to use it?*
- *Have you been able to use the facility when you need it?*

8. What benefits, if any, have you personally experienced due to the new processing facility?

Probe: Have there been any other benefits for your farm due to the facility? Or any others you anticipate?

Being a co-op member—tensions and rewards:

It's really unique that the poultry processing plant is owned and run by a cooperative – it's the first cooperative poultry plant in the nation! In light of that, I'd like to specifically ask you about your experience being a member of the cooperative.

9. When did you become a member of the Poultry Grower's Co-op?

10. What services offered by the cooperative have you used?

Probe: Cooperative feed ordering? Shared equipment?

11. For a moment, think back to your decision to join the co-op. Why did you originally decide to join?

12. What is your role in the co-op?

*Follow up/clarifying: Are you currently or have you been a Board member?
If so: What does that role involve?*

13. Prior to joining the Poultry Growers Co-op, did you have any experience with other co-ops?

14. How important is it to you that a cooperative build and owns the processing facility? Why?

15. Thinking about your overall personal experience as a member and owner of the co-op, have you personally experienced any frustrations or challenges because of the cooperative structure? If so, would you tell me about them?

Probe: Are there any other frustrations or challenges for you personally in the co-op?

Probe: Could you give me a specific example of this?

16. Have you personally experienced any benefits of being a member and owner of the co-op?

Probe: Are there any other benefits you enjoy personally because this is a co-op?

Probe: Could you give me an example of this?

17. Is there anything you wish the co-op did differently or could do differently?

18. Bigger picture: My last question is about the bigger picture—how the co-op fits into the western Montana community and the larger food system. Thinking about western Montana, why is the co-op important to the local or regional community?

Probe: Anything else that western Montana gains from the processing facility specifically?

Wrap up: Before we finish, I wanted to ask if you have any questions for me related to our conversation or this project. I also want to ask if you have anything else to add to our conversation today.

Thanks so much for your time!

After the interview: STOP RECORDING.

Co-op Affiliate Interview Guide for Montana Poultry Growers Co-op Report

Before interview: Make sure to check recorder, and to have extra batteries.

Introduction: Thanks so much for agreeing to participate in this interview. These interviews are central to a study I'm doing with Lake County Community Development on the Poultry Growers Co-op's new poultry processing facility and people's perceptions of it.

More specifically, I'm trying to learn about what folks involved with the processing facility's establishment see as the challenges and successes of setting up the processing facility to be part of the co-op. I'm also interested in talking with you more generally about some of your experiences related to this project.

Before we get started, I want to let you know that your identity as a participant in this study will remain confidential. Your name won't be used in any presentations or written reports. And, if at any time you decide you don't want to be included in the study or would prefer for me to omit any information you share, feel free to get in touch with me.

I also want you to know that we'll be publishing a report on this research, hopefully in the spring or summer, and we'll be sure to let you know when it is available in case you'd like a copy.

Do you have any questions before we get started?

If it's okay with you, I'm hoping to record our interview to ensure that your views are accurately recorded, and it lets me to focus on our conversation. Is that okay with you?

IF YES, TURN ON RECORDER AND PRESS RECORD. If no, prep to take notes.

Background and involvement: Let's start with a little background about you and your involvement with the co-op.

1. I'm wondering if you could tell me a little bit about yourself.
What do you do?
How long have you been a meat inspector?
Have you done poultry inspecting elsewhere?
2. Would you tell me a little about the structure of the Montana Department of Livestock?

What is the hierarchy of people working there?

How are the staff in the Department distributed throughout Montana?

3. Are there other poultry processors in Montana?

What enabled other poultry growers to build a processing facility?

4. Where do people process their birds across the state?
5. Were you involved at any point with the mobile unit?
6. When did you first become involved with the processing facility project?

Why did you decide to become involved with the co-op on this project?

7. **Co-op benefits and challenges:** Since you've been involved with this project, I'm interested in your perspective on the co-op's process of establishing the processing facility. What was your role in helping to get the processing facility started?
8. What were the challenges or barriers for the co-op in getting the go-ahead for this processing facility?

Were there any other challenges?

9. Were there any challenges for you personally in helping with this processing facility?

Were there any other challenges?

10. What benefits, if any, do you see for poultry growers in opening this new processing facility?

Probe: Any other benefits for poultry growers because of this facility?

11. Do you see any opportunities in the future for poultry growers or the community stemming from this project?

12. Does it matter to you that it is a co-op that built and owns the facility? Why or why not?

13. **Regulatory process:** What have historically been the challenges to poultry processing in Montana?

Are there any other challenges for poultry growers in Montana?

14. I'm wondering if you would briefly explain any exemptions that might be important to know about in the poultry processing world.

15. What differences, if any, did you experience in working with a co-op instead of a private business on this kind of project?

Have there been any other differences in working with a co-op?

16. Why, if at all, is this processing facility needed, from a regulatory perspective?

Are there any other reasons the processing facility is important?

17. Is there anything you wish the co-op did differently or could do differently in establishing the processing facility?

18. **Bigger picture:** My last question is about the bigger picture—how the co-op fits into the western Montana community and the larger food system. Thinking about western Montana, why is the co-op important to the local or regional community?

Probe: Anything else that western Montana gains from the processing facility specifically?

19. Do you have any recommendations for other folks I should talk to regarding the processing facility?

20. If I have any other questions for you, is it OK with you if I follow up after this meeting? Where do you prefer for me to reach you (phone or email)?

Wrap up: Before we finish, I wanted to ask if you have any questions for me related to our conversation or this project. I also want to ask if you have anything else to add to our conversation today.

Thanks so much for your time!

After the interview:

- STOP RECORDING.



Building a Local Poultry Economy

Montana's first co-op poultry processing facility creates new opportunity for producers



Pasture-raised poultry, such as these chickens housed in movable coops at Living River Farms in Montana, can now be processed within the state, thanks to a new packing facility built and operated by the Montana Poultry Growers Cooperative. Photos courtesy Living River Farms

By **Catie DeMets**

Editor's note: DeMets is a Master's student in the Environmental Studies Department at the University of Montana. She wrote this article in collaboration with the Cooperative Development Center at Lake County Community Development Corporation (LCCDC). For more information about LCCDC, visit: www.lakecountycdc.org.

CO-OP MONTH

Montana is a challenging state for growing pasture-raised poultry, due to its harsh climate and the long distances between marketplaces. In 2006, six poultry growers formed the Montana Poultry Growers Cooperative, aiming to overcome these challenges by providing shared resources that support poultry production and processing and, in turn, help develop the state's local

food economy. The co-op has grown to 15 members, who have benefited from services like shared processing equipment and collective feed purchases. The co-op's recent construction of a poultry processing facility is helping producers grow their operations and reach new markets.

Until last year, the lack of a processing facility significantly limited the growth of a local poultry industry. "There was literally no facility we could use for processing birds under state inspection," says Laura Garber, one of the co-op's founding members.

Before July 2016, the only state-inspected poultry processing facility was owned by the New Rockport Hutterite Colony near Choteau, in central Montana. Under state law, the Colony – as owner of the inspection license – is the sole legal user of the facility.

Without a licensed processing facility they could use, other poultry growers were in a bind. Very few markets were

willing, or able, to buy poultry that was not state-inspected. This deterred many producers from growing their operations beyond a few hundred birds, at most, per year.

Mobile unit no silver bullet

In 2007, the co-op tried an innovative strategy to address the need for a processing facility: a mobile processing unit that traveled from farm to farm. While this provided a market entry point for homestead-scale and micro-industry poultry growers, the logistics of the operation made it uneconomical.

“We would drive it 600 miles to process 100 birds, and then we had to drive it back,” Garber says. “It just fell off the usability scale.”

For the community, the value of the facility is changing the value of the birds, “because it puts something real back into someone else’s pocket, too.”

Between the vast distances separating producers and the wear and tear caused by so much transport, the mobile unit proved unviable. It was dismantled in 2012.

This left a critical market void for co-op members and other poultry growers across the state. For most members, it meant scaling back or maintaining production levels that were manageable for producers using the co-op’s shared processing equipment.

Three sets of the equipment — each consisting of a small plucker and scalding — are located around the state for members to rent. Producers do their own pickup and return of the gear. This is an attractive option for growers who want to process poultry for personal consumption. Without state inspection, however, poultry processed using the shared equipment is not legally saleable.

For those poultry growers wanting to enter the market, a state-inspected facility was still the key to building a local poultry economy. Some members had previously explored the option of building their own brick-and-mortar processing facilities, but the cost of doing so was prohibitive. Moreover, under state licensing law, only the producer who built the facility was legally permitted to use it. For producers looking to expand their operations, this presented a major obstacle.

Finding a solution in cooperation

In 2014, Beau McLean and Christopher Green started Living River Farms just a few miles from Garber’s farm. Hoping to fill the niche of locally, sustainably raised poultry, McLean and Green started looking for ways to build a processing facility, which they considered the lynchpin for their operation.

Meanwhile, Garber was also seeking to expand her poultry

operation but could not see how to do so without a processing facility. When Ravalli County economic development agent Julie Foster, who had been working with both parties independently, introduced them to one another, the wheels began to turn.

The first step was to figure out how to build a processing facility that both Garber and Living River Farms could legally use. The second step was to secure construction funds.

As the new partners dove into the regulations, they learned that while the law says a facility must be owned by a single entity which also must be the sole user, there was no specification regarding the owning entity. How, they wondered, could they become one entity?

At that point, McLean and Green were not co-op

members — they had initially been unaware that the co-op existed. Garber pointed out that if McLean and Green joined the co-op, it could move forward on the project as the entity that would own the poultry inspection license. Any member of the co-op would then be legally entitled to use the facility. It was the perfect solution.

It took some long discussions to get the Montana Department of Livestock on board, but eventually the state agreed that the co-op could own the license. As Garber points out, “No one [in Montana] had done it that way yet. They were skeptical at first. But it’s totally legal.”

The co-op tapped a variety of funding sources to build the facility, notably a Growth Through Agriculture grant from the Montana Department of Agriculture and by forming a partnership with Montana Farmers Union. Combined with funding raised through a Kickstarter campaign, the co-op raised the necessary funds — about \$120,000. The facility was built on Garber’s farm, near Hamilton, within an hour’s drive from Living River Farms and a number of other co-op members’ farms.

Laying the foundation

Construction began in late 2015. Co-op members, key partners, and advisors (such as a state meat inspector) performed the majority of the planning and construction work. There were no off-the-shelf plans or blueprints available for a facility suitable for the co-op’s needs. So, they made adjustments to the plan as they went.

“We literally went out on the concrete pad and drew everything out with chalk [as we] stood there,” visualizing pieces of the facility, Garber recalls. They erased and redrew lines to create an on-the-spot blueprint.

There was also lag time between construction and the receipt of funding (the former progressing faster than the latter). Despite such challenges, the facility was finished, inspected and approved for business by July 2016; processing began almost immediately.

The facility has been quite successful so far, co-op members say.

“It’s a good little facility,” says Gary Hamel, bureau chief of meat inspection for the Montana Department of

Although there has generally been less co-op activity in eastern Montana, some members are beginning to discuss the possibility of opening another processing facility.

Mark Rehder, a longtime co-op member from central Montana, explains that an additional facility could act as a catalyst for spurring more interest in growing poultry and would better serve existing co-op members in the eastern part of the state.

This would be “challenging at best,” says Rehder, but is an



The power of the group — “a community of like-minded individuals” — is the essential lifeblood of the co-op.”

Livestock. “It’s not a big facility, but it doesn’t have to be in order to be relatively efficient. They’re doing about 300 birds a day when they operate, which is on par with New Rockport Colony [the largest poultry producer under Montana state inspection].”

The heart of the co-op

While highly accessible to some members of the co-op, the facility’s location in a far corner of western Montana makes it unfeasible, if not inaccessible, for use by many producers in the central and eastern part of the state, which stretches nearly 560 miles, east to west. In a state as large and sparsely populated as Montana, accessibility would be a problem no matter where the co-op placed the facility.

idea that deserves a close look. “It would only take one or two growers coming in and actually deciding to scale-up to make a new facility viable.”

What the co-op has learned from its experiences can be shared with others. Some members see the power of the group — “a community of like-minded individuals,” as one member put it — as the essential lifeblood of the co-op.

Rehder, working on his own, was struggling to bring a mobile processing unit to fruition when he approached the co-op about the concept. “They said, ‘Let’s join forces to do this together.’ And it was the partnership that made the mobile unit happen.”

While the mobile unit eventually proved unsuccessful, it did prove the power of cooperation in turning

Working for the community

Even without its new poultry processing facility, many members see the co-op as providing significant economic benefits for growers through collective feed ordering and by sharing the co-op's processing equipment. In a rural state like Montana, these services are what enable small-scale poultry production.

With a small but growing number of beginning farmers in Montana, the co-op provides a venue for sharing ideas and knowledge in a region where small-scale poultry production is difficult, due to predators and a short growing season, among other reasons.

As the most significant group of local poultry growers in the state, the Montana Poultry Growers Cooperative helps interested growers tap into a new niche market. The potential for growing this market is "wide open," according to Jan Tusick, advisor to the co-op.

Tusick has a solid grasp for market potential in the state, based on her many years serving as director of the Cooperative Development Center at the Lake County Community Development Corporation (LCCDC). She has provided technical assistance to the poultry co-op as well as to a number of other co-ops and small food enterprises.

LCCDC has been highly successful and ambitious in promoting and supporting the growth of a regional cooperative network and local food economy in western Montana.

Like LCCDC, co-op members' interest in poultry production extends beyond personal economic gain to serving the community and developing Montana's local food economy; for example, the co-op employs about six people who work at the processing facility. Garber explains that members are "creating a job for somebody by bringing their chickens to the facility and having someone else process them. It's a community benefit."

an idea into reality.

The co-op has learned the importance of the group uniting around common needs and collaborating in small, rural communities, "particularly for growers who are trying to take the next step up beyond the small-scale, homesteading equipment to [expand to] a business scale," Rehder emphasizes.

If your goal is a new facility, Garber says the most important question is: "Who's your group that will make it happen? That's going to be the biggest challenge."

The co-op's poultry processing facility is a "complete footprint that someone could copy," Garber says. "The design of the building and the permitting, which meet all codes, and the process of using the facility — it could all be transplanted somewhere else. All someone needs is \$120,000 and a place to put it," she adds with a laugh.

Creating economic opportunity

Although the co-op received funding to support the development of the facility, "the co-op's revenues have covered the operational costs," according to Jan Tusick, director of the Cooperative Development Center at Lake County Community Development (LCCDC), who provided the co-op with technical assistance in fundraising, fiscal management and food safety planning.

The co-op employed six to eight people at the processing facility during its first year. "Everyone who's working at the facility is getting paid a fair wage, which is really important," Garber points out. As members grow their operations, the co-op hopes it can employ more workers in its processing facility.

Ultimately, the impact of the co-op is greater than just the money producers earn for their chickens.

"There's way more to it than just the cost of the 'end bird,'" she continues. "The facility might not be changing the price of my bird that much, but for the community, it's changing the value of my bird, because it puts something real back into someone else's pocket, too."

The co-op may also begin to explore the possibility of developing its own label, which would support efforts to educate the public about why locally, sustainably grown poultry is more expensive.

Dave Renn, a co-op member in western Montana, explains that the co-op is well-positioned to engage in this educational effort. "People will pay more if they really feel like they're getting something different and more valuable... The way to do that is to completely eschew the industrial scale and collaborate to make the smaller, radically different system work."

As the co-op embarks on an ambitious journey towards developing a more local food system, its members seem bolstered by a sense of personal and collective pride in their work and the difference they are making in their communities.

"The idea of doing something together has a lot of benefit, if for no other reason than just having the correct mentality that a rising tide floats all boats," says Audra Bergman, a member in central Montana. "The co-op and the processing facility is one small step in changing the world. It's one of a kind." Smiling, she adds, "That's way too cheesy. Don't tell anyone I said that!" ■

Triple Divide Organic Seed Co-op Article for Lake County Community Development Corporation



From Seed to Seed

A Case Study on Triple Divide Organic Seeds Cooperative

Lake County Community Development Corporation
Cooperative Development Center
March 2018

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Introduction

Triple Divide Organic Seeds Cooperative develops plant varieties for Montana and other northern latitudes by improving and adapting open-pollinated, locally resilient vegetable and flower seed crops using organic practices. Their aim is to return seed ownership to the region's farmers and gardeners to build a secure local and regional food and farm system. Triple Divide's members are located across Montana, and cooperate to grow 160 seed varieties for an online catalog and seed racks in retail locations around the state. Triple Divide officially incorporated as a cooperative in 2014, but members have collaborated on seed-related activity since 2012. Initially, members focused on education and knowledge-building around seed production: they attended seed school, conferences, and workshops, and worked with Organic Seed Alliance for technical assistance on seed production and Lake County Community Development Corporation for guidance on forming a cooperative. While members continue to grow as seed producers, they have begun to shift their focus to shaping Triple Divide into a successful business. This case study explores challenges and successes for members in growing Triple Divide, as well as Triple Divide's significance and future. This report summarizes research and results of in-depth interviews with all co-op members, highlights key lessons learned in developing a seed co-op, and discusses salient next steps for Triple Divide. This report is meant to be shared with co-op members and partners, as well as others interested in establishing or growing a rural seed cooperative.

A Brief History of Triple Divide Organic Seeds Cooperative

"I'm still amazed that something got started right here in MT. It's one thing to be interested in growing and saving seed, and it's another thing completely to grow a business. We have a unique setting and great resources here. It's exciting to be a part of."

-Triple Divide member

While Triple Divide officially incorporated as a cooperative in 2014, it began to take shape a few years before then. In 2012, six farmers around Montana, including the cooperative developer for Lake County Community Development Corporation (LCCDC) at the time, began talking together about their interest in seed. They represented a range of abilities and knowledge in seed, from beginning farmers to self-described "seed dabblers" to a few who had been producing and saving seed for decades. In order to begin conversation with other farmers about their interests and needs around seed, this core group agreed to hold "regional interest potlucks." Potlucks were held in the Flathead, Mission, and Bitterroot Valleys, and in Great Falls. Sensing keen curiosity to learn more about seed, LCCDC's cooperative developer acquired funding to bring Bill McDorman, of the Southwest-based organization Native Seeds/SEARCH, to teach "Seed School," a week-long intensive workshop on seed production, at the University of Montana. Sierra Seeds, a California-based seed co-op, was present at Seed School, and talked with interested participants about starting their own seed co-op.

Of the 30 people at Seed School, a core group emerged and began discussing starting a cooperative seed enterprise. At the time, there were no farmers specifically producing regionally adapted seed varieties to sell in Montana—a role which had been previously filled primarily by Fisher Seeds in Belgrade and the

Triple Divide Organic Seed Coop Case Study

Bitterroot-based company Garden City Seeds—and many in the group saw this as a critical void in the Montana agriculture system, as well as a unique economic opportunity to diversify their revenue streams. As conversation continued around the possibility of a cooperative seed enterprise, the group clarified its first priority: developing members' knowledge of seed production. With this goal, members pursued opportunities to attend seed workshops and conferences, notably Organic Seed Alliance's (OSA) biennial "Organic Seed Growers Conference." Members discussed the significance of these early events in codifying the group through shared experience, inspiration, and learning. A Rural Cooperative Development Grant secured by LCCDC's cooperative development center, as well as scholarship money through OSA, provided key financial support for members to attend these workshops and conferences.

By 2013, the group was certain that they wanted to form a seed cooperative to produce regionally adapted seed. They held their first annual meeting that year. While members focused on important co-op-related decisions, such as the name (Triple Divide Organic Seeds Cooperative) and whether to require co-op members to be certified organic, the cooperative developer worked on the details for forming a cooperatively structured business. Wanting to transition into a more active role in the co-op as a member and seed producer, the cooperative developer left his role at LCCDC, but retained significant knowledge and skills related to cooperatives. By 2014, once it was officially a cooperative, a series of three Specialty Crop Block Grants (one secured through LCCDC and two through OSA) supported and continue to support Triple Divide's development.¹

Specifically, to build their skills in topics such as variety trials, germination testing, and grow-outs, members have recently participated in significant educational opportunities, including a workshop with the Northern Organic Vegetable Improvement Collaborative (NOVIC), workshops and technical assistance with OSA, and education from seed experts at the past couple Montana Organic Association's (MOA) annual meetings.

As members have gained a baseline of knowledge, experience, and confidence in seed production, they are turning more of their attention to the business side of Triple Divide. Already, they have garnered significant interest in and support for their seeds: their sales have doubled from \$9,000 to \$18,000 in three years, and they have expanded their seed catalog from 60 to 160 varieties, offered online and at 15 retail locations around Montana. Last year, they sold 9,000 seed packets. Even so, members do not yet experience significant economic benefit from Triple Divide, and many operational logistics need to be refined. As such, members are looking to continue to build a business that is economically sustainable and that offers significant economic benefit for members, in addition to the educational benefits it has so far emphasized. For the past two years, all of Triple Divide members' time doing co-op-related work (outside of seed growing and organizing variety trials) has been paid by the co-op's sales, as opposed to grant support.

Presently, all paid activities (e.g., warehouse management, seed packing, website and catalog development, and sales and marketing) are offered to members first and then hired out when necessary, as in the case of seed packing. Members can participate on co-op committees including grow-outs, quality control,

¹ The first Specialty Crop Block Grant supported education and market development, as well as one person's time to organize these activities. The latter two have not provided financial support for Triple Divide staff, except to organize and write crop trial reports.

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equipment, production, and variety trials. They also have the opportunity to serve on the five-person board, comprised entirely of Triple Divide members. All members are expected to attend an annual meeting and participate in phone conference calls throughout the year. They also purchase a common stock share of \$150, which entitles them to one vote per farm in the cooperative as well as the benefits of using shared equipment and selling seed. (Members have the option of paying for common stock at the beginning of their membership or having the stock drawn from their seed sales payments.) Triple Divide owns a germination chamber for conducting germination tests. Last year, funding through a Specialty Crop Block Grant enabled Triple Divide to purchase four sets of seed cleaning screens, distributed throughout the grower regions. They also have access to a cargo trailer with seed cleaning equipment, owned by OSA, which includes an AT Ferrell Clipper and a “Winnow Wizard” that performs precise density separation of small seed lots.

Co-op members benefit from the ability to acquire seed contracts with other companies, in addition to growing for Triple Divide. This gives growers the option to scale up, and increases the economic viability for seed production to become a significant element of members’ enterprises.

Project Background

As the number of small, diversified farms increases in Montana, Triple Divide is filling a critical gap in the regional food system by growing and selling regionally adapted vegetable and flower seed. Seed is the foundation of agriculture, and in the face of corporate consolidation of the global seed industry, Triple Divide reclaims ownership of this foundation and shares it with the regional community. It is one of a vast minority of seed companies in the United States that focus on organic, open-pollinated seeds, thereby helping to meet a crucial need for organic seed in the organic agriculture industry. Triple Divide’s co-op structure provides a way for regional producers to collaborate to assemble a full catalog of seed varieties, which is nearly impossible for a single farm, given the nature of seed pollination. The co-op structure moreover provides a fairly low-risk way for members to experiment with diversifying their revenue streams through seed production in a highly competitive environment for local agriculture.

Given its uniqueness and importance, the researcher spoke with each of Triple Divide’s members to document the challenges and successes of building the co-op, as well as their personal experiences and lessons learned throughout Triple Divide’s journey to date. Members participated in individual in-depth interviews averaging 50 minutes in length. In total, over nine hours of interviews were conducted with eleven co-op members from central and western Montana. They shared information based on a variety of questions, including: *Why is Triple Divide needed? What has supported the co-op’s development over time? What challenges has the co-op encountered through its growth? What are the benefits of the co-op for members? What difficulties do co-op members face in participating in Triple Divide? What are Triple Divide’s biggest next steps?* The following sections describe key lessons and observations learned from these interviews.

Key Lessons and Observations²

Members are Inspired and Motivated by a Variety of Needs

Members expressed a range of goals for the co-op, but they were unified in Triple Divide’s mission and motivated by the possibility of meeting many different needs for themselves and their community. All eleven members emphasized the importance of both elements of Triple Divide’s mission: cooperating to grow regionally adapted, organic, open-pollinated seed and seed sovereignty. They work towards this mission by developing the opportunity and capacity of farmers to produce seed, filling a market niche for regionally adapted seed, and cooperating as an antidote to corporate consolidation of the seed industry. One member encapsulated the importance of revitalizing farmers’ knowledge of regionally adapted seeds: “There’s so little history of actual production of any scale of organic vegetable seed in Montana...There are a lot of opportunities for seed but it hasn’t been connected very well to new growers, [and] this is a significant opportunity.”

Developing farmers’ knowledge as a path to community self-reliance was discussed in terms of both agricultural sovereignty and economic independence. Members expressed that “if we don’t work together to grow seeds in our own bioregion, no one else is going to do it for us,” and they often connected this to the economic importance of regional seed production: “We have an excellent niche for seed growing here in Montana...Triple Divide gives people a chance to learn about and explore raising seed...and it has great potential to become economically important.” Members also felt they were more generally “creating a more wonderful place to live” by cooperating to share knowledge and, in turn, meet a demand for locally grown seed: “The only meaningful agricultural knowledge is what is possessed by a community. It’s not enough to have it in a single individual’s mind...we all share with each other and we all really need to share that enthusiasm and experience collectively. We matter collectively.”

The Co-op Structure Supports Meeting Many Needs

The cooperative structure of Triple Divide is conducive to meeting many different needs for members, from fulfilling personal and community values to providing economic benefits. Cooperatives are designed to meet both values-based and economic needs, which other business models often struggle to balance. One member explained that this is related to the scalability that the co-op structure creates: “Cooperatives are a great way for the local and regional food movement to scale up while creating structural changes that maintain the values of the local and regional food system.” For Triple Divide, scalability was not simply an added bonus; it was essential: “Because of how a lot of vegetables are pollinated, you can’t have more than one variety of certain things like squash on the farm. With six or eight of us, we can have six or eight different varieties of squash...The co-op was a way to provide and grow a lot of different regionally adapted varieties amongst all of us.”

The cooperative structure meets economic needs for members by providing a low-risk environment for them to build skills and sell their seeds through Triple Divide and, for some members, contracts with other seed companies. Without Triple Divide, members could not individually sell seeds in Montana because it would be “nearly impossible for one farm to produce the full selection you need to have a seed company.” The co-op structure also provides another revenue stream for farmers, increasing competitiveness and

² Note: For a complete list of benefits and challenges cited by members, see the Appendix.

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economic opportunity. In this early stage, members are making “a little bit” of money from Triple Divide, though members look forward to this number growing. For some growers working with other companies on seed contracts, seeds are becoming a “significant” part of their business; all attribute this success, at least in part, to the support they have received from Triple Divide. The other key economic component for members is consistency and reliability over time. Members explained that the cooperative structure supports Triple Divide’s long-term equity and resilience: “if an individual loses interest or wants out, they’re not the owner; we’re *together* the owner. And then there’s room for someone new to step in.” In other words, Triple Divide will not fail simply because one member decides to leave the co-op.

The co-op structure also supports building an equitable, sustainable business model. Triple Divide hires its own members for managerial work (as opposed to contracting with an outside party) and pays an equal hourly rate for all members. Hiring within the co-op—combined with the relatively small membership of Triple Divide—means that members are engaged in a variety of activities that build skills and community: “When you look at the roles the different co-op members are playing, they’ve all been able to bring different skills to bear and develop skills. Everyone’s experienced a lot of personal development in their own skills and capacities. And they’ve built really strong relationships with one another.” Members emphasized that one of the most important outcomes of Triple Divide is strong friendships with co-op members, strengthened by a shared mission. One member summed this up: “I love our co-op and our co-op members. . . we talk and support each other, and it’s nice to know there’s a group of people who are working on the same mission as me, even if I don’t get to talk with them on a regular basis.”

The Co-op Champion Carries a Double-Edged Sword

All members emphasized the importance of the “co-op champion,” who was the LCCDC cooperative developer in the early years of conversation about seed, prior to Triple Divide’s incorporation. During this time, a Rural Cooperative Development Grant funded a contractor to conduct a market study and the cooperative developer to coordinate related activities. A year before Triple Divide incorporated, he left his position at LCCDC to pursue seed production on his farm. After leaving his position as cooperative developer, he became more active in the co-op as a farmer-member. On his own time, he wrote the first Specialty Crop grant proposal and presented it to LCCDC, who took over management of the grant. Once approved, this funded his time to manage various contractors who provided education and marketing material development for Triple Divide. Later, he approached OSA with ideas for the second and third Specialty Crop grants and asked them to champion Triple Divide’s work in the region, at which point OSA took over the grant proposal and application. *It is important to note that throughout, there was clear separation between his two roles to avoid any conflict of interest.* In Triple Divide’s nascent stage, the co-op champion was a major benefit and challenge for the co-op—particularly due to his initial position as a cooperative developer. One member explained this tension: “Everything was in his brain and he was in a role that no one else could fulfill because of his position [at LCCDC]. . . it was frustrating to see that he was overworked but not be able to change it or help him. It was too much responsibility for one person.”

The fact that he was initially being funded by the first Specialty Crop grant, which enabled him to devote significantly more time to Triple Divide’s business development, set a precedent of reliance on him. As a result, many members did not necessarily understand the amount of work he had been doing. Once he was no longer grant-funded to work on Triple Divide, “it was tricky because everyone was accustomed to him doing so much work and didn’t realize just how much he was doing. So that transition was, and is, a real

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challenge.” Many members felt that because they did not “hold the bigger picture,” they did not have the skills, knowledge, or time to transition into positions that would alleviate him of some responsibility. Yet, all members recognized the indispensability and magnitude of his work for Triple Divide. One member explained that, “you need that one person who is motivated and knowledgeable to be the momentum.” She humorously added, “Without him, we might just be a bunch of shambling farmers.”

Relationships and Natural Growth Set the Co-op up for Success

Members talked about how shared experiences, building a positive group rapport, and letting the co-op grow at a natural pace set Triple Divide up for success. Many observed how the co-op has “brought them closer together” through shared experiences and interests, such as the formative 2012 OSA conference. As one member explained, “I decided to join because I liked all the growers, and I love the whole cycle of seed growing, from seed to seed. I wanted to be able to do that more and support other growers that I really admire and like to be with.” This sentiment has created commitment, buy-in, and momentum for members, who feel that they have “helped each other become better farmers and seed stewards than any of us could have been alone.”

Particularly during the first few years of the co-op’s formation, the co-op was not focused on creating economic gain. This gave the co-op time and freedom to find a shared mission and vision and begin moving forward with clarity and solidarity of purpose. Throughout this process, co-op members had space to present a diversity of perspectives, which was important because “being able to have different perspectives gives newer members—particularly those with less experience in business and production—new viewpoints from more knowledgeable members.” Another member said that, “The more minds and the more people we have, the stronger we are.”

As Triple Divide has grown, commitment to the co-op has, in many cases, strengthened as people feel a strong sense of reward for their efforts. In addition to supporting members’ development as seed growers and farmers, members communicated a strong sense of efficacy in observing co-op members’ successes: “It’s been amazing to see how fast some of these farms have grown, from learning about growing seed to doing it on a pretty large scale, employing workers and having interns that travel from out of the area because they’re really excited to learn about seed saving in Montana.” By allowing Triple Divide to “incubate” while members develop their knowledge, skills, and relationships, members feel that the co-op has built the foundation for a sustainable business. While some would like to move towards a more aggressive approach to future development, many feel that Triple Divide’s current rate of growth will result in “economic significance” for members in the future.

The Co-op Fulfills Diverse Member Goals

Members highlighted a variety of motivations for joining Triple Divide. These ranged from learning about a topic of interest to collaborating with a group to diversifying their farm (economically and biologically) to making seeds a significant economic element of their farm. For those most interested in the educational component, Triple Divide is a relatively low-commitment way to “dip [their] toes into seed growing.” It also gives members the opportunity to support other farmers in a common mission. One member explained that, “The nature of farming is pretty isolating at times, and the ability to...support each other and answer questions for each other is wonderful. If one of us succeeds, we all succeed.”

Most members expressed a desire to benefit economically in some way, though the expectations for this differed greatly between members. While some saw production for Triple Divide as a small “supplement” to their farm income, others considered it to be an opportunity to partially or entirely transition to seed production (for Triple Divide and seed contracts with other companies) from their farm’s current activities. Many members’ expectations have evolved with the co-op’s growth, as it pivots from a purely educational organization to a business that can support growers who are scaling up their production. For these members, contracts are currently their primary economic support, as Triple Divide can only handle and sell a relatively small amount of seed. Even so, as the source of education, training, and shared equipment, Triple Divide has been many members’ primary facilitator for increased seed production. For members who are not aiming to scale up their seed production significantly, Triple Divide provides off-season income or funds for their spring expenses. It is also a source of economic sustenance for members who may be scaling down their production or evolving their farm—whether through continued seed production as they age or employment with the co-op. Economic benefit or not, all members agreed upon one final motivation for joining Triple Divide: “I’ve made a bunch of new friends! That’s pretty cool.”

Accountability and Communication are Difficult, but Essential

To continue to support members’ goals, communication and accountability are essential. This has proven challenging for Triple Divide: members are busy, hard to reach, and “spread out across the state,” there are no systems to ensure accountability, and members feel insufficiently compensated for co-op-related work. Communication is particularly difficult because, as farmers, “we’re only really mentally available for a very short period of time in the winter, and in the rest of the year, we scatter to our fields and never hear from each other because we’re working endlessly outside and never coming in to our computers and telephones.” Even when members are mentally available, they have other obligations to fulfill. This is compounded by the sense that “members are supporting Triple Divide with their time” and that “the relationship between us putting in work with the co-op and receiving income for it is not always apparent.”

These communication challenges are exacerbated by a lack of accountability for co-op activities: “Putting together five or six or ten farmers who are all super busy—that’s a tall order. Some details just don’t happen. And who’s responsibility is it? No one’s. But everyone’s.” Without systems to hold people accountable, follow-through has been a challenge, and members have struggled to stick to decisions: “Every year, we revisit decisions we made the previous year that we didn’t deliver on. We go back and say they didn’t work, but they didn’t work because we didn’t implement them.” While members “want to continue to work based on our own honesty and self-accountability,” most felt that a structure for accountability would help them stay on track with timelines, spread the co-op’s workload among members, and develop the co-op as a business.

All members felt that meeting more frequently would address some accountability issues. As one member put it, “We could have a really amazing thing if we could all get together and dedicate a little more time to it.” In addition to helping with accountability, getting together more frequently could help address the fact that it is difficult to “keep people’s commitment and enthusiasm during the building phase of something that we’re hoping will have more fruition in the future. To have a tangible sense of working together—that’s part of the glue that makes people feel they’re working as a group,” which is important for the long-term sustainability of Triple Divide.

Next steps

Key next steps for Triple Divide emerged from the researcher's synthesis of interview results.

- *Developing the business side:* While some members felt that Triple Divide should continue to focus on education and skill-building, many expressed the desire to develop the co-op's business capacity. So far, this has been hindered by the fact that members have struggled to balance priorities and take on extra responsibility for Triple Divide when their time is already consumed by their personal enterprises. Furthermore, members have shied away from responsibility because they may not feel they have the knowledge or experience to help with business development, which many perceive as requiring a different skill set than farming. Continued education and training for members on building the business side of Triple Divide will be essential in strengthening the co-op's capacity to build economic power and significance, enabling members to grow not only through the co-op but also on contract as they gain efficiency and scale. A few members also suggested that adding select new growers who were interested in pursuing seed production as their primary enterprise might be helpful in ensuring future leadership and economic development of the co-op.
- *Making key decisions:* As Triple Divide grows, it is essential for members to continue to make decisions and answer key questions as a group. Members spoke about a number of questions that are important for the co-op to tackle together so they can move forward in solidarity with a clear, shared strategy. These questions include:
 1. Should Triple Divide prioritize adding new varieties, or focus on stewarding varieties that are already in the catalog?
 2. Who is Triple Divide growing for—gardeners, small farmers, or both? Who does Triple Divide envision growing for in the future, and what is the path to achieving this?
 3. What is Triple Divide's membership policy? Is Triple Divide accepting new members? What is their strategy for membership in coming years?

Members also discussed the need to develop and refine Triple Divide's co-op policies, or "work out the kinks," as one member put it. This includes ironing out details such as: how to fairly divide varieties and quantities, hierarchy policies, sales projection accuracy (to determine how much seed to pack, grow, and hold out for the following year), and quality management activities (including grow-outs, variety checks, and establishing how much time should be allotted to developing new varieties before they are put into the catalog). Members stressed the importance of discussing and shaping these co-op policies as a group.

- *Ensuring leadership, accountability, and fair distribution of responsibilities:* Building a sustainable cooperative and business requires assurance of leadership, fair distribution of responsibilities, and organizational accountability to fulfill those responsibilities. Members pointed out that in the past, many decisions and tasks have been pushed off to the annual meeting, putting unrealistically high pressure on a single event to address important co-op affairs. As a result, the annual meeting can be stressful and insufficient for doing everything necessary—an unproductive and unsustainable approach to running Triple Divide.
-

Instead, members suggested planning in advance to build in more time throughout the year to meet with other members. Some proposed requiring participation in these meetings to address accountability issues—though all felt conflicted in suggesting more requirements for members. Members also described feeling unfulfilled by conference calls, and all emphasized that in-person meetings, while more difficult to arrange, were more effective, inspiring, and rewarding. One member suggested hiring a staff person—possibly not a fulltime farmer—to coordinate task distribution and help with administration, particularly for activities that need to occur in a timely manner. Discussing better communication strategies and other meetings planned in advance is an important step for the co-op in terms of ensuring that co-op members feel inspired, informed, accountable to fellow members, and actively involved in moving the co-op forward.

- *Building the co-op's reputation:* Building Triple Divide's reputation is a key aspect of growing its economic impact. The co-op has already begun to establish a reputation through their seed packets, which have already experienced "significant public interest" at retail locations around the state and online. This year, a rebranding project, including a new seed packet design, will hopefully contribute to "a more glossy presentation," a more eye-catching presence on seed racks, and increased sales. In addition to presentation, establishing reliability through details such as timeliness in getting their catalog online in the winter and ensuring superior, true-to-type seed is crucial "so that we consistently demonstrate a high quality that people can rely on." (The specifics of the quality management activities, which are currently being developed, are discussed in the second bullet point, *Making Key Decisions*.) Building a reputation of quality and consistency will help Triple Divide begin to sell seed to more small farmers regionally, who some members currently suspect "don't trust us to know what we're doing yet." In addition to sell to small farmers, a solid reputation will help members acquire desirable seed contracts with other seed companies. As the co-op builds its business in the coming years, establishing their reputation will be vital to their success.

You can learn more about Triple Divide Organic Seeds Co-op at <https://tripledivideseeds.com/> . Also, you can find more information about the Lake County Community Development Corporation at <https://www.lakecountycdc.org/> .

This report was researched and written by Catie DeMets, Masters Student in Environmental Studies at the University of Montana, Missoula, MT, in collaboration with Lake County Community Development Corporation's Cooperative Development Center.

Triple Divide Organic Seed Coop Case Study

Appendix: Summary of Results

Table 1. The following table distills the key benefits that Triple Divide members experienced.

Type of benefit	Specific benefit
Growing seed with co-op	
	Fun and different from vegetable production
	Biological benefit for pollinators and farm
	Good growing conditions in MT (dry autumns, isolation, cold winters)
	Ability to grow more involved crops:
	...biennial seeds
	...small seed (e.g., carrot seed)
	Learn skills from other members
	Gain experience
	Shared seed cleaning equipment (increases efficiency)
Group support	
	Enthusiasm to help other members: "Cooperating feels good!"
	Each member contributes different skills
	Friendship
Community empowerment	
	Shortening and localizing food chain
	Fulfilling personal values
	Co-op structure enables sale of regionally adapted seed in MT
	Low-stakes learning environment encourages beginning farmers to participate
Economic	
	Ability to grow with other companies on contract
	Hiring selves as employees for co-op work outside seed growing
	Keeping money in local community
	Off-season income
	Diversifying production/revenue streams
	Increasing economic opportunity (sales are growing annually)
	Building reputation (e.g., with new design for seed packets)
	Website, online catalog
Sense of efficacy	
	Ability to grow own plants from own seed
	9,000 packets sold in 2017—lots of Triple Divide seed being planted regionally
	Opportunity to learn many and varied skills as members

Triple Divide Organic Seed Coop Case Study

Table 2. The following table distills the key challenges that Triple Divide members experienced.

Type of challenge	Specific challenge
Need to develop new knowledge, skills	
	Seed growing
	Seed cleaning
Time and prioritization	
	Harvesting, germination testing are very timing-oriented
	Seed cleaning during off-season can be time-consuming
	Difficult to prioritize seeds over more urgent farm tasks
	Difficult to manage time with other obligations
	...off-farm jobs
	...parenting
	Seeds add time and complexity to winter/spring planning
Seasonality/weather	
	General unpredictability
	...spring fluxes (uncertainty when to plant, can cause early or late bolting)
	...smoke (can cause unexpected maturation behavior, low pollination)
	Short autumn ripening and drying window
	High wind (esp. in central and eastern MT)
Predation	
	Deer, antelope
	Rodents (raccoons, skunks)
	Insects (weevils)
Distance	
	Difficult to access shared equipment
	Difficult to schedule and attend in-person co-op meetings
	Central members have more responsibility in day-to-day co-op activities
Lack of open-pollinated/organic seed	
	Difficult to find new, potentially successful varieties
Economic	
	Labor vs. time payoff can be minimal
	Limited potential to sell through co-op due to small scale
	One-year payment lag for seeds (payment based on sales, not contracts)
	Unpredictable income source
	Inefficiency due to small scale (esp. in seed cleaning)
	Difficult to acquire desirable contracts without established reputation

Co-op Member Interview Guide for Triple Divide Organic Seed Co-op Report

Before interview: Make sure to check recorder, and to have extra batteries.

Introduction: Thanks so much for agreeing to participate in this interview. These interviews are really central to a study I'm doing with Lake County Community Development on the Triple Divide Seed Co-op.

We're trying to learn about what co-op members, like you, see as the challenges and successes of building and growing Triple Divide over time. I'm also hoping to talk with you about some of your experiences being a co-op member.

Before we get started, I want to mention that your identity as a participant in this study will remain confidential. Your name won't be used in any presentations or written reports. And, if at any time you decide you don't want to be included in the study or would prefer for me to omit any information you share, feel free to get in touch with me.

I also want you to know that we'll be publishing a report on this research, hopefully in the spring or summer, and we'll be sure to let you know when it is available in case you'd like a copy.

Do you have any questions before we get started?

If it's okay with you, I'm hoping to record our interview to make sure your views are accurately recorded, and so I can focus on our conversation. Is that okay with you?

IF YES, TURN ON RECORDER AND PRESS RECORD. If no, prep to take notes.

Background and involvement: I'm hoping to start with some background about you and your involvement with the co-op.

1. I'm wondering if you would tell me a little bit about yourself. How long have you been farming?

Probe (as needed): How long have you been growing seed?

Probe: Does your farm or ranch focus on seed or do you have other enterprises?

Probe: What are they?

2. What challenges has your own farm faced in growing seed in Montana?

Probe: Have there been any other challenges for your farm in growing seed?

Experience of establishing the co-op: I'm hoping to learn about your perspective on the process of establishing the co-op.

3. Were you involved in Triple Divide Co-op's formation? (If yes) How?

Probe: Ask "would you tell me more about that?" when appropriate.

4. Why is the co-op needed?

Follow up (if needed): Why was the decision made to form the co-op?

5. What challenges, if any, have the seed growers had in building Triple Divide?

Probe: Have there been any other challenges in this process?

Probe: How has the co-op been able to address these challenges?

6. What successes, if any, have the seed growers had in building Triple Divide?

Probe: Have there been any other successes in this process?

Probe: In what ways has the co-op been able to build on these successes?

Being a co-op member—tensions and rewards:

Being a co-op, Triple Divide has a relatively unique model for a seed company. In light of that, I'd like to ask you about your experience being a member of the cooperative.

7. When did you become a member of Triple Divide?

8. For a moment, think back to your decision to join the co-op. Why did you originally decide to join?

9. What is your role in the co-op?

Follow up/clarifying: Are you currently or have you been a board member?

If so: What does that role involve?

10. Prior to joining Triple Divide, did you have any experience with other co-ops?

11. How important is it to you that Triple Divide is a cooperative? Why?

12. Thinking about your overall personal experience as a member and owner of the co-op, have you personally experienced any frustrations or challenges because of the cooperative structure? If so, would you tell me about them?

Probe: Are there any other frustrations or challenges for you personally in the co-op?

13. What benefits, if any, have you personally experienced by being a member of the co-op?

Probe: Have there been any other benefits for your farm? Or any others you anticipate?

14. Is there anything you wish the co-op did differently or could do differently?

15. What is your vision for Triple Divide in the future? Or, what are some next steps you envision for Triple Divide?

16. My last question is about the bigger picture—how the co-op fits into the western Montana community. Thinking about western Montana or even more broadly, why is the co-op important to the local or regional community?

Probe: Anything else that western Montana gains from the co-op?

Wrap up: Before we finish, I wanted to ask if you have any questions for me related to our conversation or this project. I also want to ask if you have anything else to add to our conversation today.

Thanks so much for your time!

After the interview: STOP RECORDING.

ELEMENT 3

Program Evaluation: Reflecting on the Process for Future Improvement

The following section, which completes the circle of organizational process represented within my portfolio (see Figure 4), presents a report I wrote for Community Food and Agriculture Coalition (CFAC). This report is based on the formal program evaluation I conducted in partnership with CFAC on their October 2015 to October 2017 “Community Food Project” grant, and is published on CFAC’s website. The report includes a reflection on the evaluation’s limitations, as well as appendices containing the interview guide and survey instruments I created and used throughout the evaluation.

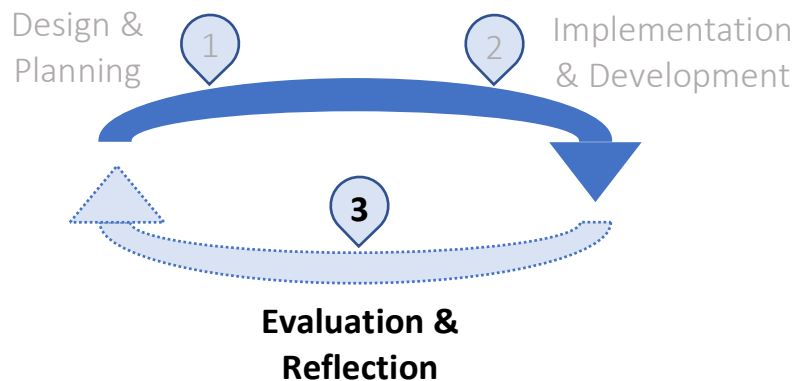


Figure 4. My portfolio’s third element, a program evaluation of a regional, multi-year food access program, explores the evaluation and reflection phase for an organization.

Food Security & Strong Communities

Grant Program Evaluation, Oct 2015-Oct 2017*



Community Food
Agriculture Coalition
OF MISSOULA COUNTY

In partnership with
Farm Hands—Nourish the Flathead &
North Missoula Community Development Corporation

*We gratefully acknowledge funding provided by the Community Food Projects Grant Program at the US Department of Agriculture's National Institute of Food and Agriculture.

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Report by:
Catie DeMets
Community Food Project Evaluation Coordinator
Environmental Studies Masters Program
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March 2018

Introduction and Study Methods

From October 2015 to October 2017, the Community Food and Agriculture Coalition (CFAC) partnered with organizations and communities in western Montana to carry out a USDA Community Food Project (CFP) entitled *Food Security and Strong Communities* (herein referred to as “the project”). CFAC’s overarching purpose was to bring together regional businesses, nonprofits, and community members in a coordinated effort to reduce food insecurity by building self-reliance of low-income people in western Montana, while also increasing market opportunities for local farmers and ranchers. The “Double SNAP Dollars” (DSD) program, which provides a dollar-for-dollar match (up to \$10 or \$20) for community members when they use SNAP to buy local produce, was central to the project’s success. Through the DSD program and other activities, the project greatly benefited western Montana’s people and communities.

The project enabled over 2,450 people to use Double SNAP Dollars (DSD) incentives at 11 retailers, enriching local farmers with \$210,000 of SNAP and DSD incentives spent on fresh and local food. Of the people who used DSD incentives, over 1,000 were new to the DSD program.

The primary goals of the project¹ were to:

- Increase self-reliance among low-income community members by developing leaders and engaging grassroots action to increase community food security throughout western Montana;
- Build capacity among low-income people through a targeted marketing campaign aimed at increasing the purchase and preparation of locally produced foods;
- Develop and support innovative strategies that connect local producers to a wider market of low-income people to increase farm profit and viability;
- Develop incentive mechanisms at established retail locations to increase access and affordability of local foods by low-income people, and increase profitability for farms;
- Expand the program regionally and provide best practices to other communities.

To assess the impact of project activities implemented to meet the goals above, CFAC contracted with a third-party evaluator to conduct a collaborative evaluation. A team of regional community members, selected for their diversity of interests and positions in western Montana’s local food system, guided and participated in the evaluation process. Based on the project’s primary goals, the team created a set of questions to be evaluated:

- **Guiding question:** *To what extent did the project increase community food security and self-reliance throughout western Montana?*

¹ For a complete list of goals and activities outlined in CFAC’s original project proposal, please see Appendix B.

- **Economic incentives:** *How successful were incentive mechanisms, such as DSD, as innovative market activities to increase local food access and affordability? What helped the development and success of the DSD program for partners? What obstructed it? In what ways did the DSD program contribute to the vibrancy of local farms?*
- **Connecting DSD customers and farmers:** *In what ways did this program connect low-income people with their local food system and farmers? How did this program support innovative strategies to connect local producers to a wider market of low-income people to increase farm profit and viability?*
- **Self-reliance for DSD customers:** *In what ways did the project contribute to self-reliance and capacity-building for low-income people in purchasing and preparing locally produced foods?*
- **Regional collaboration:** *What lessons were learned about growing multi-sector, collaborative partnerships in western Montana as a means for increasing regional food security, self-reliance, and knowledge-sharing?*

To answer these questions, the evaluation team developed and carried out these methods:

- Paper-and-pencil surveys of:
 - Regional DSD customers (n=96)
 - Regional DSD vendors (n=61)
- In-depth interviews with six DSD customers, including three “Street Team²” members, three cooking class participants, and one CSA participant (Note: Some interviewees fit more than one category.)
- Facilitated roundtable meetings with:
 - Regional project partners and cooking class organizers
 - Missoula project partners and sponsors
 - Street Team

The evaluator systematically analyzed results using qualitative and quantitative methods. The most significant results are synthesized in this report, and will be shared with project partners and the evaluation team with the aim of future program improvement. Please see Appendix A for a discussion of study limitations, and Appendix C for the evaluation’s instruments.

Additionally, this evaluation report focuses primarily on qualitative indicators, and complements CFAC’s final technical report for USDA’s National Institute of Food and Agriculture (NIFA). Direct accomplishments for individual project goals and activities are highlighted in CFAC’s technical report. Please contact Kim Gilchrist at kim@missoulacfac.org for more information on this technical report.

² The Street Team is a group of four SNAP and DSD users, paid hourly to conduct grassroots outreach to low-income consumers about SNAP and DSD usage at farmers markets, grocery stores, and CSAs while building personal leadership skills and connections to community members who are active in the local food system.

Whole Measures

Evaluation questions and methods draw from the “Whole Measures for Community Food Systems” evaluation tool, which was initially developed as a values-based planning and evaluation tool for community food security projects. The tool delineates six main categories for assessment:

- Healthy People
- Strong Communities
- Thriving Local Economies
- Vibrant Farms and Gardens
- Sustainable Ecosystems
- Justice and Fairness

The evaluation was developed around these categories to holistically assess the project’s impact. Our goal was not to quantify the discrete impact of each category individually, but rather to use the categories as guidelines to ensure a balanced and fair set of evaluation questions.

Overview on project region

Between October 2015 and October 2017, three organizations³ in six counties around western Montana collaborated on the project. Altogether, they introduced the DSD program to 11 food retailers, including seven farmers markets, three community supported agriculture (CSA) programs, and one food co-op. In total, over 2,450 customers spent \$210,000 of SNAP and DSD incentives on local, fresh produce, supporting regional farms and food businesses.⁴

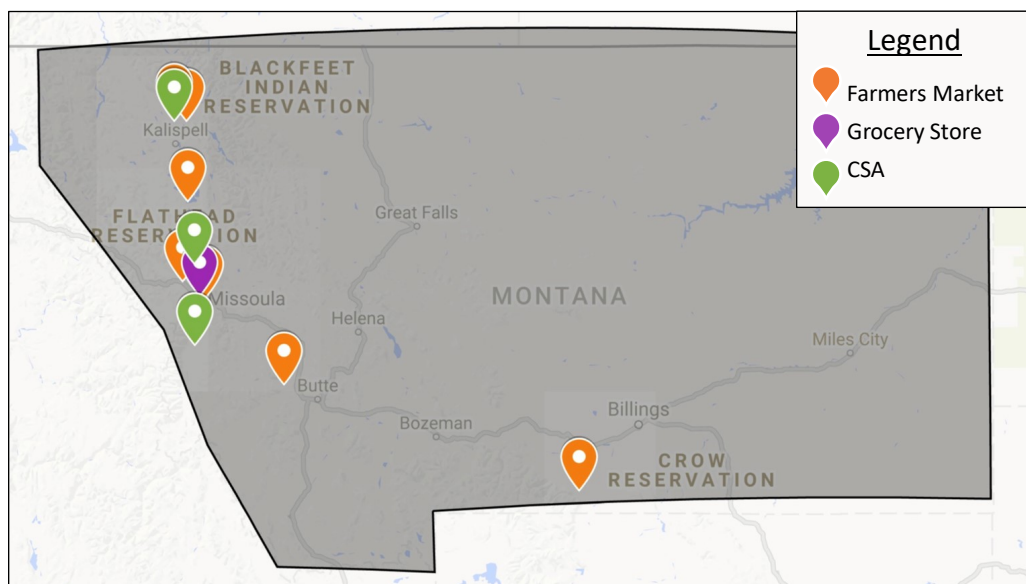


Figure 1. Map of project retailers.

³ Community Food and Agriculture Coalition, Farm Hands—Nourish the Flathead, and North Missoula Community Development Corporation.

⁴ While totals include additional funding sources, the CFP grant was the catalyst for success by funding partners’ time to organize regional implementation of the DSD program.

Economic incentives

The DSD program and other incentive programs such as cooking class vouchers directly increased access and affordability of local foods for low-income people, and in turn increased profitability for farms, one of the project’s stated goals. The evaluation examined the impact of the project on vendors and the factors that contributed to and impeded the DSD program’s regional success through vendor surveys and roundtables with program partners. Please see CFAC’s final technical report for information on the specific activities and accomplishments of this portion of the evaluation.

SNAP sales on local food increased from \$64,000 in 2015 to \$110,000 in 2017, a 44% cumulative increase—highlighting the DSD program’s success in increasing food access.

A 44% cumulative increase in SNAP sales means that over 2,450 SNAP customers or families were able to more fully participate in their communities, increasing the social and economic inclusivity of regional farmers markets, CSAs, and the Missoula Food Co-op. Out of 61 vendors surveyed at farmers markets, 88% felt that the DSD program was important to the farmers market as a whole, particularly in terms of “drawing new people to the farmers market.”

“Access to fresh food is a right! We love serving people who otherwise could not afford local produce.” -Local farmer

While 47% (n=61) felt that the DSD program was important to their individual enterprise’s sales, vendors talked more about creating an equitable local food system: 80% (n=61) pointed to the larger importance of DSD incentives for customers. One vendor explained that the DSD program was “not so much [about the] money, but more about trying to increase access to good food.” Most stressed that it was essential to “help those in need,” and highlighted that access to local produce should be “easy and dignified for all.” Most vendors considered the DSD program as an opportunity to increase their engagement in food access and social justice.

Nine out of ten vendors felt that the DSD program helped them meet their business’ goals somewhat or significantly.

When asked about the effect of the DSD program on sales at farmers markets, two-thirds of respondents (n=58) felt that the DSD program increased sales, while the rest felt sales had remained steady. Vendors frequently mentioned the “side effect” that DSD incentives enabled SNAP customers to spend their regular SNAP money on previously unaffordable items such as meat and cheese—creating more economic opportunity for local food vendors.

Project participants attributed successes and challenges of the DSD program to many factors, as represented below. Subjects discussed frequently and in depth are at the top of each table, while items mentioned casually or infrequently are near the bottom. This does not necessarily indicate the level of importance of the topic; it simply reflects the evaluation’s results.

<i>Table 1. Factors contributing to the Double SNAP Dollars program's success</i>
Centralized, careful program management at CFAC
Paid staff members at partner organizations to run program
Ease of getting SNAP & DSD tokens at farmers markets
Regional collaboration on DSD program: sharing of information & marketing materials
Effective outreach efforts (e.g., posters & flyers in community; food bank; Street Team)
Incentive programs to spread awareness (e.g., Senior coupons, school coins, class vouchers)
Regular vendor education on various incentives
Good DSD incentives data & tracking capacity
Supportive farmers markets: board, vendors
Regional cross-promotion of DSD program: spread brand awareness, loyalty
Training for DSD volunteers at markets: how to discuss DSD incentives, set up table; procedures list

Table 1. Factors contributing to the DSD program's success. Factors are ranked top to bottom by frequency and weight of discussion. Table represents an aggregation of factors between all surveyed markets participating in the DSD program, and not all markets experienced all factors.

<i>Table 2. Factors limiting the Double SNAP Dollars program's success</i>
Takes a long time to get SNAP & DSD incentives awareness & advertising to "stick"
Uncertainty about which venues are most effective for outreach
Vendor & customer confusion over what can be purchased with DSD incentives
Vendor & customer confusion over SNAP vs. DSD token distinction
Identifying best format & information to include on marketing materials
Lack of uniform and efficient data tracking on cooking classes and DSD incentives
More (paid) staff resources needed for effective implementation of DSD program
Limited retailer or vendor involvement or interest
Stigma about SNAP/government assistance
Paying with tokens separates DSD customers from other customers
Inconsistency of information about DSD program

Table 2. Factors limiting the DSD program's success. As in Table 1, factors are ranked top to bottom by frequency and weight of discussion. Table represents an aggregation of factors between all surveyed markets participating in the DSD program, and not all markets experienced all factors.

Recommendations

A few key areas for development arose from the evaluation. Increasing people's awareness of the DSD program is critical. This requires targeted marketing efforts to more people and for a wider audience. Evaluation participants stressed that doing outreach to senior citizens, veterans, and Native Americans and expanding the DSD program to other retail venues like more grocery stores may increase the viability and inclusivity of the program. Continuing to leverage other incentives such as senior coupons and cooking class vouchers will grow awareness and program loyalty. By increasing access to DSD incentives, profitability for farmers and local food vendors will rise. This may engender greater retailer loyalty and commitment to supporting the implementation of the program. Finally, uniformly and consistently tracking vendors' SNAP and DSD sales might demonstrate the importance of the program to vendors' businesses. It would also give vendors the opportunity to use tracked information to better serve and attract new SNAP and DSD customers.

Connecting Double SNAP Dollars customers and farmers

Another project goal was to *develop and support innovative strategies that connect local producers to a wider market of low-income people to increase farm profit and viability*. The evaluation assessed this through in-depth interviews with six DSD customers, including members of the Street Team, and a survey of DSD customers. The evaluation found that connections between local producers and customers frequently arose from spontaneous interactions. Customers indicated that, through interacting with and economically supporting farmers—while also feeling welcomed in their communities—the DSD program connected them to their farmers and food system on personal, economic, and political levels.

Responses to two particular questions from a survey of DSD customers around western MT tell a compelling story about the depth with which the DSD program helped connect low-income people with their local food system and farmers. When asked about their comfort level shopping at farmers market before versus after using the program, respondents (n=85) indicated that their comfort level increased considerably:



Figure 2. Comparison of surveyed DSD customers' (n=85) comfort level at the farmers market before and after the DSD program.

As customers indicated in the same survey, the experience of farmers market was often about much more than just a grocery shopping trip: for instance, 68% (n=90) felt they learned more about local food and farmers. As one respondent explained, *“I learned about co-ops, farmers' market vendors and their varying products as well as CSAs, which I didn't know existed before.”* Another expressed that, *“I am delighted by the variety of food and the friendliness of farmers here [at the farmers market].”*

Six interviewees, all DSD customers, expressed that the DSD program connected them with their local food system and farmers in many ways, three of which are highlighted here. Interviewees are labeled by letters A through F.

Community building

All interviewees felt that the DSD program helped them feel not only welcomed into their communities, but also more engaged and invested in contributing to them. They expressed

that the outcome of this community connection was a more inclusive farmers market atmosphere, which, as many expressed, led to a stronger community as a whole. One interviewee detailed her own experience of this:

“When I first went to farmers market, I felt very on the outside of it. I just wanted to zip in and zip out, and I felt embarrassed that I didn’t have much to spend. But with Double SNAP Dollars, I gradually felt much more part of the community, because I was accepted without being questioned, I was welcomed in every way, and I was greeted with cheer and kindness every week by the market managers and the vendors. They appreciated me as a customer. The farmers appreciated the business and the Double SNAP Dollars program appreciated that I wanted to take their help. Now, if there are opportunities to help people, I will extend them to those in need in my community... Double SNAP Dollars contributes to a higher feeling of wellbeing and energy in the community.”

–Interviewee E

Gratitude for farmers

Four interviewees discussed their experience of learning how hard farmers work to produce good food for their communities. For them, it was not only important to support farmers economically, but to have gratitude to farmers for their efforts. In different ways, all expressed that knowledge of the farmers’ struggle made them more loyal to farmers and helped them feel that, as one interviewee said, “we’re all in this struggle together.” One interviewee, on the Street Team, described this feeling:

“I was blown away to learn how much food we have and how hard farmers are working. Farmers are working really hard, and we have to support them in whatever way we can, because we don’t see what it’s like for them. We see their products, but we don’t see their long, hard hours. Seeing myself in it, as a part of it—I don’t grow the food, but I sure work hard to help other people spend their money on it. I tell farmers how appreciative I am that they’re working hard to feed us so well. Without them, we are in big trouble.”

–Interviewee A

Ability to enact values

All interviewees articulated a strong sense of empowerment in describing the economic “buying power” they gained through the DSD program. Far beyond stating that they simply had more money for buying produce, in all cases interviewees felt that the program gave them the capacity to fulfill values such as contributing to the local economy, choosing local farmers, and supporting farmers who practiced sustainable agriculture. In having the chance to participate in farmers markets, interviewees felt more empowered to make informed, good food choices, in turn making them more loyal to farmers and farmers markets. One interviewee, a Street Team member, explained this:

“I’m interested in growing our local economy. Ideally, everyone we buy from will be in our community, so buying locally for me is like voting for the community I want to live in. Double SNAP Dollars enables me to make that vote.”

–Interviewee C

“Double SNAP Dollars gives me the chance to use my EBT card in a better way than grocery stores that are full of packaged food. I need, and want, to be eating fresh food. When I have the chance to make choices with what I’m going to eat at a farmers market, it gives me more of an opportunity to discover new foods. Double SNAP Dollars makes it fun to go to the farmers market. When something’s fun, I do it more. So I go [to the farmers market] more, and I think more about food.”

–Interviewee B

In reflecting on their larger role in the food system, two interviewees discussed their ability to enact political values, especially related to local versus “big” agriculture, with DSD incentives:

“I like not supporting agribusiness but rather supporting real people who are doing something from their heart that is good for the community. It’s the better way to be a consumer. Double SNAP Dollars helps me sustain life better than supporting agribusiness by buying blind from the grocery store. It feels simpler, it removes some of the artificiality in our food system, and I feel good supporting people who are restoring the earth with sustainable farming.”

–Interviewee A

Recommendations

Project partners could focus on key areas to ensure that empowerment and self-reliance remain priorities. Many SNAP customers only attend the farmers market and use DSD incentives once, which does not necessarily result in a sustained sense of community or farmer connection and has little long-term impact on farmers’ profits. Focusing on DSD customer retention may increase benefit for both farmers and customers. Furthermore, most DSD customers indicated their preference to be treated as “regular” customers, and to form connections with farmers by buying from them (as opposed to meeting them in structured environments such as “farmer meet and greets”⁵).

Program partners might focus on supporting spontaneous connections and other organic ways of connecting farmers and DSD customers, such as the Street Team. Continuing to prioritize and apply feedback and preferences of

“With Double SNAP Dollars, I can get a CSA. Something that would have felt out of reach, irresponsible to sign up for, was suddenly within my reach. I can have the best [produce] that’s out there. Another aspect of a CSA that’s wonderful is feeling part of a community. It makes me feel connected and cared about. I care about you, you care about me.”

–Interviewee D

customers may help determine marketing and customer retention strategies. Simultaneously, customers stressed the importance of feeling welcomed at the farmers market throughout their experience, from the EBT information table to vendors’ stands. Ongoing support for this is key for building a repeat-customer base and investment in community.

⁵ While some structured activities were initially outlined in the project proposal, many were changed or replaced based on feedback and prior experience, indicating outcomes-based responsiveness and flexibility.

Self-reliance for Double SNAP Dollars customers

The project worked towards a goal of *building capacity among low-income customers through a targeted marketing campaign aimed at increasing the purchase and preparation of locally produced foods*. Another was to *increase self-reliance among low-income community members by developing leaders and engaging grassroots action to increase community food security throughout western Montana*. Efforts focused on three main areas: the DSD program, cooking classes and workshops, and the Street Team. The latter two areas especially supported meaningful, sustainable engagement with the local food system beyond economic contribution.

“Double SNAP Dollars makes farmers markets a possibility for low-income families who might not otherwise be able to afford them.”
 –Interviewee F

Nutritional goals

One of the most significant indicators of self-reliance is the ability for people to achieve personal nutritional goals. Of 96 surveyed customers, 79% of respondents expressed that the DSD program **significantly** helped them reach their nutritional goals, while the remaining 21% felt that the program **somewhat** helped them meet their goals. Furthermore, 98% felt that the program alleviated their concerns about their ability to afford healthy meals:

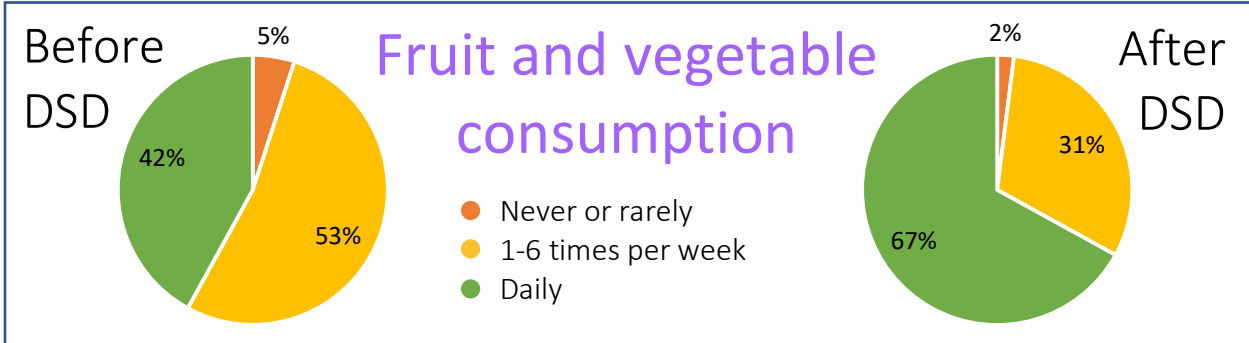


Figure 3. Comparison of surveyed DSD customers’ fruit and vegetable consumption before vs. after using DSD incentives (n=90). Note the 25% increase in daily produce consumption.

Survey Participant Stats
(n=85)

- **77% female, 23% male**
- **Over 50% support at least one child under 18 years**
- **64% have a college degree or higher**
- **41% are aged 25 to 34 years**

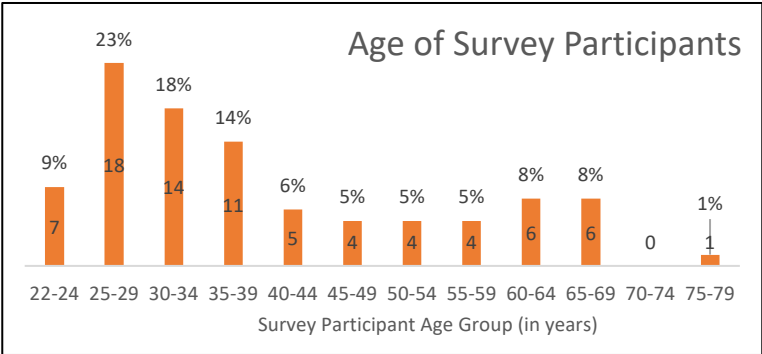


Figure 4. Age of survey participants (n=80).

When asked to write down their nutritional goals as part of the DSD customer survey, respondents shared a variety of goals, which fell into ten categories:



Figure 5. Nutritional goals of surveyed DSD customers (n=88). Many respondents shared more than one goal, as reflected in the individual n-values of each category.

Many of the above stated goals suggest that DSD customers thought about nutrition not simply as healthy eating, but as a path to personal self-reliance. While this could reveal a self-selecting bias in surveyed customers, it could also indicate that having more financial resources through the program empowers people to aspire to meaningful, substantial goals for themselves and their community. In other words, people may be more likely to create substantive nutritional goals when there is a clear path to achieving them.

100% of surveyed customers felt that the DSD program helped them achieve their nutritional goals.

In interviews, the customer survey, and the regional partner roundtable, participants shed light on extensive ways in which DSD contributed to self-reliance. Three of the most significant themes are highlighted here, but this does not represent an exhaustive list.

Education for children and family

In the customer survey, 85% of respondents (n=54) had at least one child under 18 years of age in their household. Though the survey did not specifically ask about the impact of the DSD program on children, respondents offered comments about the importance of the program in building their family's self-reliance:

“DSD ensures that we get local, organic food. We are teaching our children to be environmental and health-conscious and we get to support local farmers. It’s a win-win situation.” --Interviewee B

“Double SNAP Dollars really helps me stretch money and feed my family. Plus, I’ve been able to make preserves like jams and tomato sauce for winter use. It has inspired my kids to try new things and experiment with their taste buds. I feel that our health has improved and the kids get sick less.”

–DSD Customer Survey Respondent

Interviewees with families to support (three of six) similarly discussed the importance of the DSD program in enabling them to educate family members about an array of topics related to building self-reliance, from budgeting and making food choices to learning about new vegetables and who grew them to simply the idea of healthy food being fun. One interviewee described that:

“I really like being able to make farmers market a family activity. I let the kids pick what they want to buy. They get to hang out with Mom and do a little bit of making choices with tokens. They get to know who their food came from and where it came from. It’s not just a mystery product from the grocery store. And being at the farmers market is positive reinforcement for my kids—they see that other people eat this food, too.”

–Interviewee F

Self-confidence and dignity

Five of six interviewees discussed how their greater buying power through the DSD program dignified the experience of food shopping. The program enabled them not only to participate more fully in farmers markets, but also to feel they were welcome, worthy customers. Many stressed the importance of this treatment in building self-confidence:

“Double SNAP Dollars makes it so that I can shop at the farmers market without being judged for buying responsible food with government assistance... So many things with public assistance feel shameful, but at the farmers market, there is no feeling like that at all. Double SNAP Dollars has given me financial confidence, and the confidence that I can give the best possible food to my kids and myself.”

–Interviewee D

“At the farmers market, people couldn’t have been nicer, more welcoming, more accommodating, more personable...and I couldn’t believe the array of food that was available to me, as someone who had no money in their pockets. The Double SNAP Dollars Program has helped me to feel I can have a complete food life, I can cook the things I really need, and I can take care of myself without feeling I’m being financially irresponsible in my life.”

–Interviewee E

Physical and emotional health

All interviewees discussed how the DSD program increased their wellbeing, either emotionally or physically. In turn, this allowed them to feel more self-reliant in other areas of their lives. In fact, four of six shared the ways in which the program helped them rebound from major, unexpected life events including cancer, career changes, and a house fire. Interviewees also talked about self-reliance in terms of preventative care, healing, their sense of fulfillment, and a variety of other ways. One interviewee, a member of the Street Team and activist in the local food community, described the importance of the program in her healing process:

“I am a breast cancer survivor. In the first year of recovery, my eating was horrible. It was challenging to find fresh food, and I had very little money to buy it. When I got Double SNAP Dollars, it changed everything. My healing path opened up hugely. I would contribute my health—and I’ve reached my five year mark for being a survivor—to the fact that Double SNAP Dollars allowed me to get better quality food.”

–Interviewee A

One interviewee shared the emotional fulfillment that the DSD program has given her, which helps her be more active:

“I had a house fire last year and lost everything. It broke my heart. Double SNAP Dollars has restored some hope and excitement for me. It has allowed me to eat fresh veggies and fruits. I get to go every Friday to the farmers market. I really look forward to it every week. It gets me out of the house and into the community, and it’s good for my soul to see the fresh fruits and veggies—and be able to buy some of them. Double SNAP Dollars has given me stability and access to fresh food.”

–Interviewee C

“I am overwhelmed with joy that I am able to participate in the farmers market now. Double SNAP Dollars made last summer so much better. I looked forward to farmers market all week, every week. It was so pleasant, so wonderful, so life-enhancing. Double SNAP Dollars made life brighter.”

–Interviewee B

Another interviewee talked about the many ways in which the DSD program has restored her physical and emotional health by broadening her diet with fresh food:

“I have celiac disease and a lot of food allergies, so what I can eat is very limited. With Double SNAP Dollars, I finally get everything I need... Between feeling unwell often and having cancer six years ago, my goal has been to improve my health and physical wellbeing on a daily basis, because I very much don’t want to get cancer again. Double SNAP Dollars has extended the range of my diet, which has made me healthier.”

–Interviewee E

Cooking classes

Though not uniformly tracked throughout the project, cooking class participants experienced key benefits that contributed to self-reliance, as discussed in interviews and the regional partner roundtable.

“Our cooking classes are popular, comfortable, casual, and educational. At one class, we had 29 participants including children. People are always excited to learn new cooking tricks, and learning to cook from bulk and fresh produce seems to really excite people.”
 –Project Partner

The tables below highlight key benefits for cooking class participants and challenges in organizing cooking classes arising from discussions with participants and partners.

As in previous tables, subjects discussed frequently and in depth are at the top of each table, while items mentioned casually or infrequently are near the bottom. This does not necessarily indicate the level of importance of the topic; it simply reflects the evaluation’s results.

Table 3. Benefits for cooking classes participants
Financial incentives gave SNAP participants more DSD incentives
Learned skills for food preservation: canning, dehydrating
Learned new recipes, techniques, how to use unfamiliar foods
Learned best practices for winter produce storage
Classes were fun
Safe, structured learning environment
Offered at a variety of times and venues to increase access
Learned how to buy effectively via bulk purchasing and preserving
Learned basic gardening skills
Learned food safety
Learned how to manage chronic diseases through cooking
Created a product to take home (in some classes)
Classes at schools got kids excited, engaged

Table 3. Benefits for cooking classes’ participants. Factors are ranked top to bottom by frequency and weight of discussion. Table represents an aggregation of factors between all cooking classes, and not all partners and participants experienced all factors.

Table 4. Challenges in organizing cooking classes
Large but unconnected network of people working on food access
Difficult to get participants to RSVP and follow-through on RSVPs
Outreach and marketing to appropriate audiences
Some skills from classes, e.g., canning, can be cost-prohibitive at home
Significant time required to create effective product
Inconsistent tracking and pre-/post-surveying of participants
Difficult to get SNAP recipients specifically to attend
Lack of appropriate venue

Table 4. Challenges in organizing cooking classes. Factors are ranked top to bottom by frequency and weight of discussion. Table represents an aggregation of factors between all cooking classes, and not all partners and participants experienced all factors.

Street Team

Members of the Street Team benefited profoundly from the project, in terms of personal and professional growth. Despite some challenges, all four Street Team members emphasized that they felt a strong sense of fulfillment and an enhanced feeling of self-reliance. One member in particular spoke powerfully about her experience:

“I joined the Street Team as a challenge for myself. It was my first job ever, in my entire life. I consider myself to be not a people person, and am socially awkward and suffer from significant social anxiety... Now, I have the first elevator speech of my life. The Street Team has benefited me socially because I’ve gotten less anxious about talking to people... I feel like I have credentials to network with people, determine my own future, and make my own job in local food.”

In interviews and at a roundtable with the Street Team, members enumerated benefits and areas of personal growth, as well as challenges in implementing their Street Team work. Key themes from these conversations are listed in the tables below:

<i>Table 5. Benefits for Street Team members</i>
“Gave me something organized and positive to do”
Feeling of fulfillment for doing good work
Social aspects were fun/made new friends
Giving back to community by helping others get DSD incentives
Paid, professional opportunity
Opportunity to attend lobbying event at state capitol
“Got me out of a rut in my life at that time”
Shared knowledge, feedback with DSD customers, vendors, and project partners
Provided an easy way into conversations/connections with farmers
Addressed social anxiety
First employment opportunity

Table 5. Benefits for Street Team members. Themes are ranked top to bottom by frequency and weight of discussion.

<i>Table 6. Challenges for Street Team members</i>
Often felt unclear about focus/what activities to do
Feeling of isolation from Team due to limited group meetings/activities
Limited outreach potential due to lack of coordinated effort
Difficult to recruit additional Street Team members
Difficult to quantify success
Feeling of being ineffective
Needed more preparation for consistent information/messaging
Language barriers with some vendors
Difficult to get to promotion sites without car

Table 6. Challenges for Street Team members. Themes are ranked top to bottom by frequency and weight of discussion.

Recommendations

Some primary areas for future improvement emerged from conversations with evaluation participants. Offering year-round access to DSD incentives is essential for SNAP recipients to continue building self-reliance. This might involve partnering with grocery stores to offer DSD incentives outside of farmers market season. Many participants mentioned that they would appreciate recipes and recipe cards at the farmers market to accompany unfamiliar produce items, which would encourage them to try new foods and increase their food preparation capacity. Continuing to track and survey SNAP recipients to identify how to best serve them and encourage repeat DSD customers, as well as how to effectively widen the reach of DSD program marketing efforts, is essential for the growth and sustenance of the program. Finally, the project should maintain the \$20 DSD incentive match, as customers described this as a minimum for achieving their nutritional goals.

For cooking classes, regional partners should emphasize collaboration and sharing information and resources to cut down on their planning time for cooking classes and increase the effectiveness of cooking class marketing and implementation. DSD incentives for SNAP customers were widely cited as a motivation for attending classes and were effective in drawing SNAP customers. Continuing to offer incentives, and perhaps offering a referral “bonus” for class attendees who refer another SNAP customer, may increase cooking class attendance. Setting dates and programming in farther advance for classes (e.g., at the beginning of the summer), and reminding those who signed up via email or phone calls of upcoming classes, may also streamline class preparation and increase attendance. Finally, continuing to do pre- and post-class surveys and tracking attendance may help identify what SNAP customers would like and need from classes or other workshops.

For the Street Team (which may be discontinued in the future due to lack of staff resources to organize its implementation), more oversight for Street Team members would help them perform outreach more effectively. This might include more regular meetings to check in and share successes and challenges, coordinate team efforts, do trainings on topics such as leadership, and collaborate on best approaches. Through this, a stronger strategic plan may emerge, increasing members’ sense of efficacy and team coherence in their work, and their insights may help guide DSD program marketing efforts for project partners.

Regional collaboration

One project goal focused on *expanding the project regionally and providing best practices to other communities*. Eight key themes and ideas about building regional, collaborative partnerships crystallized during roundtables with regional and Missoula partners. They are organized below by factors that were particularly successful in contributing to building regional partnerships and areas that would benefit from further development.

Contributing factors

The project experienced significant regional growth due in large part to partners' collaboration. Because the project paid partners' staff to organize and coordinate project activities, partners had much more capacity to focus on collaboration. Partners' cross-pollination of marketing materials, resources, and ideas greatly benefited the project by spreading regional DSD program brand awareness and strengthening individual communities' program-related work. These themes are developed below:

1. **Dedicate paid staff regionally** to the project. Without this, partners explained, collaboration easily falls by the wayside and is not prioritized. Volunteers' time is consumed by implementation activities, but when partners can spend part of their paid worktime collaborating regionally and building relationships, they are much more likely to experience successful, effective implementation.
2. **Find and align with supportive community allies.** One partner explained that one of her most critical successes in implementing the project in her community was that she *“worked with people who were supportive in the community. They were great about connecting me with the right resources and people. So it’s important to ask: Who’s already doing projects related to this, and how can we work together?”* Many project partners discussed the importance of taking advantage of existing resources and community connections, especially farmers market boards.
3. **Plan early** for the farmers market season. Designate time to collaboratively create a concise marketing package and effective regional DSD program implementation plans. Advance planning also ensures that data collection and tracking systems will be in place at the start of the season. Finally, it gives partners time to share information and collaborate to guarantee best practices and consistency in tracking methods.
4. **Take the time necessary to create effective regional collaboration.** It has taken the project some time to build brand recognition and awareness around the DSD program, and is a continuing endeavor. Regional cross-collaboration and -promotion have been key in building this awareness and loyalty.

Areas for improvement

While partners worked to address the challenges below, they explained that implementing project activities in the future will be more successful with greater emphasis on extensive information-sharing and strategic planning among various program partners and others in support roles. They also described the importance of dispelling stigma around SNAP in order to expand the program to more communities and people in need. Educational efforts about SNAP will benefit by continuing to include SNAP recipients in planning, marketing, and implementation of the DSD program. These lessons are further explained below:

1. **Share information** frequently with project partners regarding successes and struggles. Different partners and organizations have different strengths, so sharing best practices from experience, and asking others how they addressed challenges, can be invaluable—and time-saving—for partners. As one partner put it, *“I could have learned lots of things from talking with other project partners sooner.”* Some potential ideas for achieving successful and frequent information-sharing this could be:
 - Set required and optional meetings with predetermined discussion topics
 - Plan a combination of in-person meetings, phone calls, webinars, and other appropriate formats.
 - Hold both structured and unstructured meetings: some designed for knowledge-sharing or collaboration and discussion, others as workshops or educational opportunities.
 - Determine pre-set intervals or dates for meetings, potentially during a grant kickoff meeting with all partners.
2. **Find the best structure for disseminating key project information.** Is it enough for major grant partners to disseminate information to less central partners? Or is it important that all people overseeing the DSD program be included in some portion of project meetings? In either case, project partners found it was crucial to determine how information would be communicated to various stakeholders for to the project, and to make sure that this was communicated clearly, consistently, and efficiently.
3. **Address community stigma around SNAP.** This continues to challenge project partners. They have observed that in some communities, regardless of need, farmers market authorities (boards, market masters) altogether decline to participate in SNAP. Even at some participating farmers markets, some vendors or, in a few cases, the markets themselves, will not advertise that they accept SNAP. SNAP and DSD customers are often embarrassed to use coins, which they perceive as separating them from the rest of the shoppers. As one customer described the tokens, *“they seem like funny money.”* Overcoming this stigma is key to both sustaining the participation of current customers as well as penetrating new markets.
4. **Incorporate SNAP recipients** in regional project planning and implementation strategy, in both leadership positions and through feedback. As direct stakeholders, they have the most to gain from the program and could offer useful guidance, as well as building their own skills. SNAP customers might, for example, be well suited to guide or advise the focus of cooking classes and workshops through firsthand knowledge of what could be useful. SNAP customers may also have good ideas for marketing and outreach strategies that may not occur to others in the project. The Street Team was this project’s primary avenue for including SNAP recipients in planning and implementation. Expanding this program would greatly support the fulfillment of the project’s goals, though this expansion requires currently unavailable staff resources.

Conclusion

This project enabled organizations around western Montana to impact over 2,450 people and families through greater access to fresh, local food, educational workshops on topics from gardening to food preservation, opportunity through employment on the Street Team, and increased food security. The project catalyzed comprehensive collaboration towards regional self-reliance, which laid the groundwork for a resilient local food system that will continue to support both low-income customers and farmers who benefit economically from SNAP. In so doing, the project has contributed to a future where western Montana's communities are more connected to, and supportive of, their local food sources, where people feel dignity and rootedness in their communities by being able to participate more fully in community events such as farmers markets and CSAs, and where people are more confident in their ability to choose and provide healthy, plentiful food for themselves and their families.

You can learn more about the Double SNAP Dollars Program in Western Montana at <http://www.doubledollarsmt.com/>. Also, you can find more information about Community Food and Agriculture Coalition at <http://www.missoulacfac.org/>.

This evaluation report was conducted and written by Catie DeMets, Masters student in Environmental Studies at the University of Montana, Missoula, MT, in collaboration with Community Food and Agriculture Coalition's Food Access Program.

Appendix A: Limitations to evaluation methods

This evaluation aimed for a robust and varied set of data to explore the many dimensions of the project. As with all methods, however, improvements could be made to create an even more robust data set. To shed light on the evaluation's process, we find it appropriate to detail some of the primary methodological limitations encountered in this evaluation.

Customer surveys

DSD customer surveys at farmers markets were conducted between early September and late October, near the end of the grant period. As such, it is possible that our survey results reflect a selection bias towards DSD customers who: 1) were dedicated enough to continue coming to farmers markets in cold or inclement weather, 2) were most loyal to the DSD program, 3) did their grocery shopping in earnest at the farmers market as much as possible, and 4) whose values included supporting and eating local food. DSD customers who came only once to the farmers market or whose attendance was influenced by weather or other factors that tend to drive high summer attendance at farmers markets were less likely to have completed a survey. Therefore, it is possible that the positive impacts of the program were magnified compared to the entire population of DSD customers over the course of a farmers market season. It is also possible that more surveys would have been completed in an earlier part of the season, yielding different results.

Vendor surveys

DSD vendor surveys were conducted between mid-September and late October, near the end of the grant period. Because some vendors' presence at the farmers market is dictated by the seasonality of their products, not all vendors were present during the time of surveying. Therefore, we did not capture as many vendor perspectives as would have been reflective of the entire year. Furthermore, surveyed vendors may have been influenced in their perspective on the success of the DSD program by the late-season decline in DSD customer attendance at farmers markets.

Interviews

DSD customer interviewees were selected based on a variety of factors, including participation in a CSA, the Street Team, or cooking classes, as well as use of the DSD program and willingness to participate in an interview. Therefore, interviewees do not necessarily represent a general sample of the population of DSD customers in our project. Our goal in selecting these interviewees was not to provide a reflection of the experience of all DSD customers, which would be nearly impossible given the high use of the program, but rather, to highlight and delve into some of the more profound impacts and benefits of the program in people's lives.

The evaluation lacked resources to do in-depth interviews with vendors. These would have provided more depth to our understanding of vendor perspectives on the DSD program, as well as enabled true assessment of the Whole Measure "Farm Vibrancy."

Appendix B: Project proposal goals and activities

The following is copied from the original project grant proposal for *Food Security and Strong Communities*:

Project Goals and Intended Outcomes

The overall purpose of this project is to bring together regional businesses, non-profits, and community members in a coordinated effort to reduce food insecurity in Western Montana while increasing market opportunities for local farmers and ranchers.

Key goals and outcomes of the project include:

Goal 1) *Increase self-reliance among low-income community members by developing leaders and engaging grassroots action to increase community food security throughout Western Montana.*

- **Outcome 1:** At least ten low-income consumers will become SNAP ambassadors, building leadership skills and conducting outreach to up to 1,000 low-income consumers about SNAP usage at farmers markets, grocery stores, and CSAs.
- **Outcome 2:** At least 15 community leaders will participate in multi-sector community dialogue and development of grassroots solutions to build community food security through the CFAC food access committee.
- **Outcome 3:** At least 20 low-income consumers will be actively engaged in a planning process to develop marketing and education campaigns to educate their peers about local food and healthy eating (see goal 2).

Goal 2) *Build capacity among low-income consumers through a targeted marketing campaign aimed at increasing the purchase and preparation of locally produced foods.*

- **Outcome 1:** Through a multi-faceted marketing campaign, 2,000 low-income consumers in the project area will become more knowledgeable about where to purchase locally grown food and the benefits of doing so.
- **Outcome 2:** At least 48 Real Meals workshops will be delivered in communities throughout the region, providing at least 600 educational encounters around purchasing, preserving, and preparing local food for low-income participants.

Goal 3) *Develop and support innovative strategies that connect local producers to a wider market of low-income consumers to increase farm profit and viability.*

- **Outcome 1:** 100 local farmers will better understand how to market to low-income consumers through 3 workshops with SNAP ambassadors.
- **Outcome 2:** Innovative solutions to catalyze more connections between low-income persons and local CSAs will be identified through at least two workshops with farmers and SNAP ambassadors.
- **Outcome 3:** Based on input from these workshops, at least 3 new resources and appropriate technical assistance as needed, will be developed by CFAC to connect

farmers and low-income consumers for increased purchase and consumption of local products. (See also goal 4).

Goal 4) *Develop incentive mechanisms at established retail locations to increase access and affordability of local foods by low-income people, and increase profitability for farms.*

- **Outcome 1:** At least 1000 SNAP recipients will benefit from these incentive programs in these outlets: In year 1, at least 3 farmers markets, 1 CSA(s), and 3 local grocery stores will operate a Double SNAP Dollars incentive program, offering a 1:1 match up to \$20 on local products purchased with SNAP dollars. In year 2, the program will operate in at least 5 farmers markets, 2 CSAs, and 5 local grocery stores.
- **Outcome 2:** At least 40 families will access healthy local produce through an affordable “basics box” CSA, featuring nutritious but more affordable and familiar produce items geared toward low-income consumers.
- **Outcome 3:** Farmers participating in the Double SNAP Dollar project will see at least 15% increase in their market each year.

Goal 5) *Expand the program regionally and provide best practices to other communities.*

- **Outcome 1:** Using evaluations and other feedback and experience, a toolkit will be developed for other communities across the country, with information on how to use a similar marketing and outreach campaign linking low-income consumers and producers (see goal 2). The toolkit will focus on the role and development of a grassroots marketing campaign, but include other findings and recommendations, as relevant and necessary.
- **Outcome 2:** Statewide distribution of the toolkit to at least 2000 individuals through websites, conferences, and other appropriate venues.

Activities to Achieve the Goals

Goal 1: CFAC and our collaborative partners will bring together a corps of SNAP Ambassadors – low income consumers who are given training and support to conduct peer-to-peer outreach and promotion of the Double SNAP Dollars program, and to speak up to give input to farmers and others about ways to reach their demographic. CFAC will recruit, train, and engage a team of at least 4 SNAP ambassadors in year 1 and 8 additional ambassadors in year 2. These ambassadors will provide real world evaluation and feedback, as well as set specific guidelines and activities best suited to reaching out to fellow SNAP recipients. They will be the leaders of this project, and serve on CFAC’s Local Food System Committee to ensure that the mission of CFAC is realized through this project. Members will be empowered to guide the project and its outcomes, leading to a sustainable long-term outcome of community food security and increased access.

Goal 2: Project Partners will contract with a marketing firm to develop grassroots, effective, efficient marketing to encourage SNAP use for local fruits and vegetables. SNAP recipients, businesses, and community partners will be recruited to provide input on marketing needs

and best ways to reach SNAP customers through focus groups, interviews, and surveys (see also Goal 1 Outcome 3). NMCDC will evaluate their participant-feedback driven Real Meals program, being piloted in 2015, focusing on ways to make it relevant to SNAP consumers purchasing fruits and vegetables. They will coordinate the adaptation of the Real Meals curriculum into a resource that can be used at a diversity of rural and urban points of purchase. In both years of the project, CFAC will deliver 4 workshops at Whitefish, Hamilton and Polson, and 6 each year in Missoula. Following each workshop, we will evaluate and refine efforts to ensure program is effective and relevant to participant desires.

Goal 3: SNAP ambassadors and farmers will engage with regional business and nonprofit partners to produce guidelines and marketing plans to be used throughout the region to increase knowledge of the SNAP recipients' needs regarding food boxes that are available through the Double SNAP Dollar program.

Goal 4: Develop streamlined regional SNAP incentive mechanism for grocery stores, CSAs, and farmers markets, informed by research into current best practices and the experiences of previous regional pilots and business partners. The SNAP Ambassadors will facilitate regular meetings and communication with regional network of local partners to ensure streamlined program development, efficient resource management, and knowledge sharing. Partners will coordinate with retail location managers (farmers markets, CSAs, and grocery stores) to ensure program is implemented effectively, and to support them in their ongoing efforts. Throughout the project there will be consistent outreach to increase the number of locations participating in the Double SNAP Dollar incentive program. Additionally, we will develop support and marketing materials for retailers to identify and promote foods eligible for incentives. CFAC will conduct market research and make recommendations for WMGC and other partners to develop basics box affordable CSA option, including findings from local farmer/SNAP ambassador meetings.

Goal 5: Following the development of grassroots marketing campaign (see Goal 2) the collaborative partners will implement evaluation at end of year 1 and 2 to form recommendations for future improvements and similar programs outside our region. The SNAP Ambassador steering committee, marketing consultant, and other stakeholders will develop a toolkit to share marketing materials help others develop similar campaigns. Once complete the toolkit will be distributed through appropriate venues (conferences, partners, etc.).

Appendix C: Evaluation instruments

For readers' reference, this section includes various evaluation components, including:

1. DSD customer interview guide.....102
2. DSD customer survey.....105
3. Revised DSD customer survey based
on results and feedback from evaluation.....109
4. DSD farmers market vendor survey..... 113
5. Revised DSD farmers market vendor survey
based on results and feedback from evaluation.....116

1. DSD Customer Interview Guide

INTERVIEW GUIDE:

Double SNAP Street Team & Double SNAP Customers & Cooking Class Participants

Before interview: Make sure to check recorder, and to have extra batteries.

Introduction: Thanks so much for agreeing to participate in this interview. These interviews are central to an evaluation of the Double SNAP Dollars program that a group of organizations around town are helping with, with the goal of applying for future funding for the Double SNAP program to continue in western Montana. We're looking for honest feedback, both positive and critical, so we can create a strong program that meets its intended purpose, so feel free to share any thoughts you have, even if they seem negative.

A big part of this evaluation is talking with customers like you, who have used Double SNAP Dollars, to learn about their perspectives and experiences with the Double SNAP program.

Before we get started, I want to let you know that your identity as a participant in this study will remain confidential. Your name won't be used in any presentations or written reports. And, if at any time you decide you don't want to be included in the study or would prefer for me to omit any information you share, feel free to get in touch with me.

Do you have any questions before we get started?

If it's okay with you, I'm hoping to record our interview to ensure that your views are accurately recorded, and it lets me to focus on our conversation. Is that okay with you?

IF YES, TURN ON RECORDER AND PRESS RECORD. If no, prep to take notes.

Background: I'm hoping to start with a little background about you and your involvement with Double SNAP Dollars.

1. Think back to when Double SNAP first started, or when you first heard of it. How did you first hear about Double SNAP Dollars?

2. Where have you used DSD?

Probe: Why do you shop there, as opposed to other DSD retailer locations?

3. How often do you use DSD?

For cooking class participants:

4. How did you first hear about the cooking classes?

5. How often did you attend cooking classes? How many times did you go?

Benefits: I'd love to hear your perspective on the benefits you see in the Double SNAP Dollars program.

6. What kinds of benefits do you get out of participating in Double SNAP Dollars?

Probe: Anything else?

7. What do you think your community gets out of having a program like Double SNAP Dollars?

For cooking class participants:

8. What kinds of benefits did you get out of participating in the cooking classes?

Probe: Anything else?

For Street Team:

9. What kinds of benefits do you get out of being part of the Street Team?

Probe: Anything else?

Self-efficacy: I'm also hoping to hear your ideas about the impacts of the Double SNAP program in your life.

10. How has the Double SNAP program impacted your life?

11. Did you learn anything new from participating in Double SNAP Dollars?

Probe: Can you give an example?

12. What sorts of nutritional or health goals do you have for yourself or your family?

13. What would help you meet those goals?

14. Do you think participating in Double SNAP Dollars helped you work towards any of those goals? In what ways?

Probe: Anything else?

For Street Team:

15. How has your participation in the Street Team impacted your life?

16. Did you learn anything new from participating in the Street Team?

Probe: Can you give an example?

For cooking class participants:

17. Did you learn anything new from participating in the cooking classes?

Probe: Can you give an example?

18. Do you think participating in cooking classes helped you work towards any of your nutritional or health goals? In what ways?

Connection to local food: I'd love to spend a few moments talking about what local food means to you.

19. How did you first get interested in local foods?

20. Why are you interested in local foods?

21. Has your interest level in local food changed (increase/decrease) as you've participated in Double SNAP Dollars? In what ways?

22. Did you learn anything new about our local food and farmers since you've participated in Double SNAP? Like what?

Concerns/suggestions:

23. Do you have any concerns or suggestions for improving the Double SNAP Dollars program?

For cooking class participants:

24. Based on your experience, do you have any concerns or suggestions for improving the cooking classes?

For Street Team:

25. Based on your experience, do you have any concerns or suggestions for improving the Street Team?

Wrap up: Before we finish, I wanted to ask if you have any questions for me related to our conversation or this project. I also want to ask if you have anything else to add to our conversation today.

Thanks so much for your time!

After the interview: STOP RECORDING.

2. DSD Customer Survey

Double SNAP Dollars Shoppers Survey

Thank you for taking a few minutes to tell us about your experience with Double SNAP Dollars.

All responses will be kept strictly confidential and will not be used in any way to identify you. Your answers will not affect your benefits from the program in any way.

Please mark the answer that best fits your experience and please let us know if you have any questions as you fill out this survey.

1. Where have you used Double SNAP Dollars? (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Missoula Farmers' Market | <input type="checkbox"/> Columbia Falls Community Market |
| <input type="checkbox"/> Clark Fork Farmers' Market | <input type="checkbox"/> Missoula Community Food Co-op |
| <input type="checkbox"/> Polson Farmers' Market | <input type="checkbox"/> Western Montana Growers' Co-op
CSA program |
| <input type="checkbox"/> Whitefish Farmers' Market | <input type="checkbox"/> Missoula Grain and Vegetable CSA |
| <input type="checkbox"/> Flathead Valley CSA Share | |

2. How often did you typically use Double SNAP Dollars in 2017?

- | | |
|--|--|
| <input type="checkbox"/> A few times a week | <input type="checkbox"/> Once a month |
| <input type="checkbox"/> Once a week | <input type="checkbox"/> A few times over the year |
| <input type="checkbox"/> A few times a month | <input type="checkbox"/> This is my first time |

3. What, if anything, holds you back from eating as many fresh fruits and vegetables as you would like to? Check all that apply.

- | | |
|---|--|
| <input type="checkbox"/> I do not really like fruits and vegetables | <input type="checkbox"/> Fresh food goes bad too fast |
| <input type="checkbox"/> I do not know enough about cooking fresh food | <input type="checkbox"/> There is not a good selection of fruits and vegetables in my neighborhood |
| <input type="checkbox"/> Fruits and vegetables cost too much | <input type="checkbox"/> Nothing, I eat as many fruits and vegetables as I like |
| <input type="checkbox"/> I don't have any space to cook or store fresh food | <input type="checkbox"/> Other (please specify): _____
_____ |

4. In the last 12 months, how often were you concerned about having enough money to eat healthy meals?

- | | |
|--------------------------------------|---------------------------------------|
| <input type="checkbox"/> Never | <input type="checkbox"/> Frequently |
| <input type="checkbox"/> A few times | <input type="checkbox"/> All the time |

5. Did the ability to use Double SNAP Dollars lessen these concerns?

- Yes
 No

Next page →

6. How often did you eat fruits and vegetables *before* this program (or, if this is your first time here, skip this question)?

- Never or rarely
- 1-2 times / day
- 1-3 times / week
- 3 or more times / day
- 4-6 times / week

7. How often do you eat fruits and vegetables *now*?

- Never or rarely
- 1-2 times / day
- 1-3 times / week
- 3 or more times / day
- 4-6 times / week

8. In a few words, please describe your/your family's nutritional goals:

Explain: _____

9. How much did Double SNAP help you meet your/your family's nutritional goals?

- Significantly
- Somewhat
- Not at all

10. How comfortable did you feel buying food at the farmers market before and after Double SNAP?

...before Double SNAP?

- Not at all comfortable
- Somewhat comfortable
- Very comfortable
- N/A

...after Double SNAP?

- Not at all comfortable
- Somewhat comfortable
- Very comfortable

11. When you interact with farmers, how would you describe your interactions?

- Uncomfortable. I do not feel I am a welcome customer.
- Strictly transactional. I give them money, they give me food.
- Enjoyable. We might exchange pleasantries.
- Very comfortable. They recognize me. We talk about recipes, veggies, food, etc.
- Other (please explain): _____

12. Are you satisfied with this level of interaction?

- Yes
- No

Next page →

13. How confident do you feel in your ability to cook healthy meals?

- Not at all confident
- Somewhat confident
- Very confident

14. How often does someone in your home cook with fruits or vegetables?

- 5 or more times per week
- 3 or 4 times per week
- 1 or 2 times per week
- Less than once per week

15. Has your level of confidence in cooking healthy meals *increased* since using Double SNAP?

- Yes, my level of confidence has increased
- No, my level of confidence has not changed

16. Have you participated in any free cooking classes?

- Yes
- No (*skip to question 18*)

17. Did your participation in these classes help you use Double SNAP Dollars more?

- Yes
- No
- Please explain: _____

18. Did using Double SNAP Dollars help you learn more about local food and farmers?

- Yes
- No
- Please explain: _____

OPTIONAL:

1. Gender _____ **Age** _____

2. How many people are in your household?

Children (under 18 years old) _____ Adults (18+ years old) _____

3. What is your race? (check all that apply.)

- Black/African or Caribbean-American
- Hispanic or Latino
- American Indian
- White/Caucasian
- Asian or Pacific Islander
- Other: _____

Next page →

4. How would you describe your current employment status?

- Full-time employment (35+ hours a week, year-round)
- Part-time employment
- Unemployed, actively seeking employment
- Not employed, not seeking employment (student, retired, home-maker, disabled, etc.)

5. What is your highest level of education?

- 8th grade or less
- Some high school
- High school graduate or GED certificate
- Some college or technical school
- College graduate or more, such as graduate or professional degree

6. Anything else you'd like to add about your experience with Double SNAP Dollars? For example, what do you like about the program and/or what could make the program work better for you?

7. How often did you eat fruits and vegetables *before* this program (or, if this is your first time here, skip this question)?

- Never or rarely
- 1-2 times / day
- 1-3 times / week
- 3 or more times / day
- 4-6 times / week

8. How often do you eat fruits and vegetables *now*?

- Never or rarely
- 1-2 times / day
- 1-3 times / week
- 3 or more times / day
- 4-6 times / week

9. In a few words, please describe your/your family's nutritional goals:

10. How much did Double SNAP help you meet your/your family's nutritional goals?

- Significantly
- Somewhat
- Not at all

11. How comfortable did you feel buying food at the farmers market before and after Double SNAP?

...before Double SNAP?

- Not at all comfortable
- Somewhat comfortable
- Very comfortable
- N/A

...after Double SNAP?

- Not at all comfortable
- Somewhat comfortable
- Very comfortable

12. How confident do you feel in your ability to cook healthy meals?

- Not at all confident
- Somewhat confident
- Very confident

13. How often does someone in your home cook with fruits or vegetables?

- 5 or more times per week
- 1 or 2 times per week
- 3 or 4 times per week
- Less than once per week

Next page →

14. Has your level of confidence in cooking healthy meals increased since using Double SNAP? Please explain.

- Yes, my level of confidence has increased
- No, my level of confidence has not changed or has decreased.

15. If yes, why or in what ways has it increased? If no, what would help increase your confidence?

16. In what ways, if any, did using Double SNAP Dollars help you learn more about local food and farmers?

OPTIONAL:

1. Gender _____

2. Age

- | | |
|--------------------------------|---------------------------------|
| <input type="checkbox"/> 18-24 | <input type="checkbox"/> 55-64 |
| <input type="checkbox"/> 25-34 | <input type="checkbox"/> 65-74 |
| <input type="checkbox"/> 35-44 | <input type="checkbox"/> 75-84 |
| <input type="checkbox"/> 45-54 | <input type="checkbox"/> 85-94+ |

3. How many people are in your household?

Children (under 18 years old) _____ Adults (18+ years old) _____

4. What is your race? (check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Black/African or Caribbean-American | <input type="checkbox"/> White/Caucasian |
| <input type="checkbox"/> Hispanic or Latino | <input type="checkbox"/> Asian or Pacific Islander |
| <input type="checkbox"/> American Indian | <input type="checkbox"/> Other: _____ |

Next page →

5. How would you describe your current employment status?

- Full-time employment (35+ hours a week, year-round)
- Part-time employment
- Unemployed, actively seeking employment
- Not employed, not seeking employment
- Other (please describe):

6. What is your highest level of education?

- 8th grade or less
- Some high school
- High school graduate or GED certificate
- Some college or technical school
- College graduate or more, such as graduate or professional degree

7. Anything else you'd like to add about your experience with Double SNAP Dollars? For example, what do you like about the program and/or what could make the program work better for you?

4. DSD Farmers Market Vendor Survey

Double SNAP Dollars Market Vendor's Survey

Farmers Market: _____ Date: _____

Farm Name: _____ (This can be left blank if vendor prefers to remain anonymous.)

1. This season, which farmers' markets do you sell at? _____

2. How many of those markets accept SNAP benefits? _____

3. How many of those markets offer Double SNAP benefits? _____

4. What types of products do you sell at this market?

- | | |
|--|--|
| <input type="checkbox"/> Fresh fruits | <input type="checkbox"/> Baked goods |
| <input type="checkbox"/> Fresh veggies | <input type="checkbox"/> Meat and poultry |
| <input type="checkbox"/> Herbs | <input type="checkbox"/> Milk and dairy |
| <input type="checkbox"/> Honey, nuts and preserves | <input type="checkbox"/> Other (please specify): _____ |

5. What county do you farm in (if applicable)? _____

6. How many acres do you farm (if applicable)? _____

7. Are you aware that this market offers Double SNAP Dollars?

- Yes
 No

8. Would you say the Double SNAP Dollars program has increased or decreased the number of SNAP customers shopping at your stand?

- | | |
|--|--|
| <input type="checkbox"/> Increased greatly | <input type="checkbox"/> Decreased |
| <input type="checkbox"/> Increased | <input type="checkbox"/> Decreased greatly |
| <input type="checkbox"/> Stayed about the same | |

9. Would you say the Double SNAP Dollars program has increased or decreased your sales at this market?

- | | |
|--|--|
| <input type="checkbox"/> Increased greatly | <input type="checkbox"/> Decreased |
| <input type="checkbox"/> Increased | <input type="checkbox"/> Decreased greatly |
| <input type="checkbox"/> Stayed about the same | |

10. Roughly what percent of your sales at the farmers' market are SNAP sales?

- | | |
|---------------------------------|----------------------------------|
| <input type="checkbox"/> 0-25% | <input type="checkbox"/> 50-75% |
| <input type="checkbox"/> 25-50% | <input type="checkbox"/> 75-100% |

11. How much did Double SNAP sales help you meet your business's goals?

- Significantly
- Somewhat
- Not at all

Please explain:

12. Generally, how important do you feel the Double SNAP Dollars program is for the market?

- Very important
- Important
- Moderately important

Please explain:

13. What are the top three products your SNAP customers buy (or, if you are not sure exactly what products, list type of product, e.g., vegetables)?

14. Since the implementation of Double SNAP Dollars at this market, in what ways has your capacity to serve SNAP customers changed, if any?

- | | |
|---|---|
| <input type="checkbox"/> Better understand SNAP tokens | <input type="checkbox"/> Increased quantities of certain products |
| <input type="checkbox"/> Better understand Double SNAP tokens | <input type="checkbox"/> Changed pricing or bunch sizes |
| <input type="checkbox"/> Stayed about the same | <input type="checkbox"/> Other: _____ |
-

15. When you interact with SNAP shoppers, how would you describe your interactions?

- Uncomfortable.
- Strictly transactional. I give them food, they give me money.
- Enjoyable. We might exchange pleasantries.
- Very comfortable. They recognize me. We talk about recipes, veggies, food, etc.
- Other (please explain): _____

16. Are you satisfied with this level of interaction?

- Yes
- No

17. Do you understand the difference between SNAP tokens and Double SNAP tokens?

- Yes
- No

18. Do you have any questions regarding either of these forms of tokens?

19. What could make the program work better for you?

**20. Anything else you'd like to add about your experience with Double SNAP Dollars?
For example, what do you like and/or dislike about the program?**

OPTIONAL:

1. Age: _____
2. Gender: _____
3. Ethnicity/race: _____

OTHER CFAC SERVICES:

4. Are you aware that CFAC offers workshops for farmers on business and production topics, financing assistance, and business technical assistance?
5. Have you ever utilized these services or attended one of our events?
6. If not, what has stopped you in the past?
7. If you would like to be added to our monthly e-newsletter sharing news of these events and services, enter your email (give the Pitchfest sheet to vendor).

5. Revised DSD Farmers Market Vendor Survey

Double SNAP Dollars Market Vendor's Survey

Farmers Market: _____ Date: _____

Farm Name: _____ (This can be left blank if vendor prefers to remain anonymous.)

1. This season, which farmers' markets do you sell at? _____

2. What types of products do you sell at this market?

- | | |
|--|--|
| <input type="checkbox"/> Fresh fruits | <input type="checkbox"/> Baked goods |
| <input type="checkbox"/> Fresh veggies | <input type="checkbox"/> Meat and poultry |
| <input type="checkbox"/> Herbs | <input type="checkbox"/> Milk and dairy |
| <input type="checkbox"/> Honey, nuts and preserves | <input type="checkbox"/> Other (please specify): _____ |

3. What county do you farm in (if applicable)? _____

4. How many acres do you farm (if applicable)? _____

5. Are you aware that this market offers Double SNAP Dollars?

- Yes
 No

6. How has the Double SNAP Dollars program affected your sales at this market?

- Increased
 Stayed about the same
 Decreased

7. Roughly what percent of your sales at the farmers' market are SNAP sales?

- | | |
|---------------------------------|----------------------------------|
| <input type="checkbox"/> 0-25% | <input type="checkbox"/> 50-75% |
| <input type="checkbox"/> 25-50% | <input type="checkbox"/> 75-100% |

8. Briefly describe your mission and business goals for your farm.

9. Did Double SNAP Dollars program help you meet these goals?

- Yes, Significantly
 Yes, Somewhat
 Not really

Please explain:

10. Do you think the Double SNAP Dollars program is a worthwhile endeavor for this market?

- Yes, it's very important
- Sure
- Not really

Please explain:

11. Do you understand the difference between SNAP tokens and Double SNAP tokens?

- Yes
- No

12. Do you have any questions regarding either of these forms of tokens?

13. Do you have difficulties conducting SNAP transactions? If so, what would help improve them?

- a. Yes
- b. No

14. Do you have difficulties conducting Double SNAP transactions? If so, what would help improve them?

- a. Yes
- b. No

15. Is there anything else you'd like to add about your experience with Double SNAP Dollars? For example, what do you like and/or dislike about the program? What could make the program work better for you?

OPTIONAL:

1. Age: _____
2. Gender: _____
3. Ethnicity/race: _____

OTHER CFAC SERVICES:

4. Are you aware that CFAC offers workshops for farmers on business and production topics, financing assistance, and business technical assistance?
5. Have you ever utilized these services or attended one of our events?
6. If not, what has stopped you in the past?
7. If you would like to be added to our monthly e-newsletter sharing news of these events and services, enter your email

CONCLUSION

Below, I reflect on my learning from projects I conducted with four different enterprises in the food system that are, or could be, pollinators working to build a resilient local economy. I ponder how this work contributes to positive, lasting food system transformation. I then offer some personal reflections on my learning and successes that arose from my portfolio projects, and end by discussing how I will carry this learning forward into my future personal and professional endeavors.

Initial Reforms to Lasting Transformation

As Donella Meadows (2008) points out, systems are “seldom simple in the real world.” In other words, no one-size-fits-all approach will answer the question of how to create lasting, positive transformation in the food system and beyond. Yet this question remains critical—as long as we recognize that there are many solutions, which necessarily arise from the unique and complex context of individual people and places. But food system actors should not disengage from the larger food system while pursuing individualized solutions; rather, working together, sharing information, and learning from the experiences of others is the heart of enduring transformation. I found that, in unique ways, each of the four pollinator enterprises in my portfolio was working towards this same goal—transforming our food system—while also tackling the related and complex objective of building a resilient local economy.

Simultaneously, enterprises should not become so fixated on their final outcomes that they neglect the process. Rather, a full-circle process that focuses on each of the three stages represented by my portfolio elements—planning, implementation, and evaluation—will result in stronger outcomes. By focusing on process, enterprises are likelier to ensure that many stakeholders’ voices are heard and that a diversity of experiences and opinions will inform each action step—leading back to the next, more equitable iteration (see Figure 5).

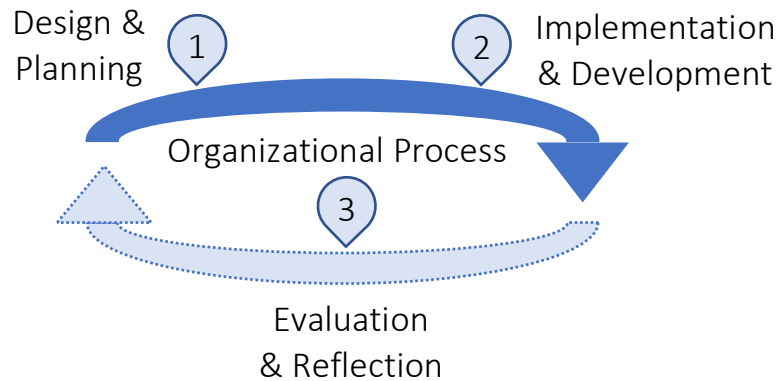


Figure 5. Conceptual model for an enterprise's life cycle, showing the full-circle, recursive nature of process-oriented work. If enterprises focus fully on carrying out each step shown here, outcomes will be stronger.

Element One: Business Plan

As I researched and shared strategies for building a local economy (in keeping with Shuman's principles of economic development), I came to appreciate the complex and individual context of each element of my portfolio, while bringing my knowledge of the larger food system to my work. Through this, I experienced the reality of balancing the pragmatic need to work within the boundaries of what exists with the desire to create the ideal vision of what *could* exist.

As I delved into the technical aspects of building a full business plan, for example, the financial realities of starting and running a business became limiting factors. Before I modeled Mirthful Farm's financials, I planned to immediately implement a "pay as you can" price structure for our products to increase Mirthful's inclusivity and accessibility. Once I began testing products, refining costs, and modeling financials, I discovered that this structure would be too unpredictable to ensure that Mirthful would break even financially. Without control over our pricing, Mirthful would not necessarily make the profit needed to implement other projects for social good, such as hiring youth apprentices and offering educational workshops. In negotiating the reality of this tradeoff, I decided that we must set fair, but fixed, prices in Mirthful's early years. As possible, and as Mirthful stabilizes, we will test "pay as you can" pricing. In the meantime, we will make the profit that we need to offer the other programming "for good" that is core to Mirthful's mission.

Being in the planning stage makes it difficult to predict who Mirthful Farm will appeal to. While we aspire to make everyone feel welcome at Mirthful, we cannot yet predict whether Mirthful will truly appeal to people of diverse backgrounds and incomes. Will Mirthful maintain the status quo, or will it meaningfully break the boundaries of the typical farmers market demographic? Part of the result relies on the business's design, and part on the community's perception of our mission and products. We hope that by intentionally building partnerships with nonprofits, social programs, and marginalized groups into our design, we will create meaningful and systematic transformation over the long term—and be a pollinator for other community enterprises.

Regardless of how Mirthful is perceived and branded, we plan to adapt to initial results. This is key to achieving intended outcomes, and we will evolve to work meaningfully toward Mirthful's mission as we gain experience and community feedback. Engaging with our community to create strong social programming reflects the “people” part of the triple-bottom-line (people, planet, profit) model for enterprises, which Mirthful will adhere to. In short, we will follow sustainable economic development principles by involving our community centrally in our design and process.

Element Two: Co-op Case Studies

While studying two cooperatives, I learned that context—people and place—influences how a cooperative comes into existence and functions over time. In turn, a co-op's approach to building a local economy is dictated by the structural and behavioral norms that its members establish.

The Montana Poultry Growers Co-op (MPGC) and Triple Divide Organic Seed Co-op (simply called Triple Divide herein) approached economic democracy from vastly different angles. For the MPGC, the cooperative structure was the most financially efficient path to economic opportunity—primarily for a few growers who were already pursuing poultry production as a full-time business. For these select growers, their interest in the cooperative model was the financial support it provided to build a poultry processing facility and thereby increase the scale of their own businesses. The ability for other, smaller-scale members to use the co-op's services seemed an

added bonus, or even incidental. Guided by these few large-scale growers, the MPGC focused first and foremost on implementation: building the processing facility to develop the businesses of a few members. This “do now, plan later” approach has resulted in the co-op neglecting to come together to create a unified mission that genuinely adheres to cooperative principles.

Is the MPGC building a resilient local economy? In the sense that the facility allows a few growers to scale up significantly, provide a sustainable product to Montana, and compete with (or at least offer an alternative to) industrial-scale poultry producers, the MPGC is creating a more democratic local food economy. Is the MPGC creating lasting food system transformation? Given that the select large-scale (by Montana standards) growers in the MPGC are disinterested in sharing ideas with fellow co-op members and poultry growers out of fear of competition, the MPGC may be headed towards replicating the industrial food system’s structure at a smaller scale, under the guise of a cooperative. Without a clear, democratic mission that all co-op members have agreed upon and are actively working towards, the cooperative may not survive, or will fail to provide members with truly equitable services. The MPGC may be building a new regional economy, but is it a resilient economy without following the guidelines of sustainable economic development?

At the same time, it is not necessarily negative that the MPGC rewards producers who have significantly invested in scaling up their businesses; rather, it is a completely pragmatic solution that acknowledges efficiency of scale. Perhaps as the MPGC stabilizes, they will be more able and willing to focus on supporting the cooperative aspects of their organization. It is too early in the co-op’s life to say whether they will create meaningful, enduring change to Montana’s food system. In researching and sharing their struggles and successes in their formative years, I hope that my work contributes to creating this change.

Triple Divide, by contrast, was initially created as an educational enterprise. The co-op was founded by a group of farmers who were interested in seed production, primarily out of personal curiosity or concern regarding community seed sovereignty, and secondarily (if at all) from an economic perspective. Triple Divide has focused on supporting its members to explore the world

of seed, gain experience in seed production, and share their experiences among each other to strengthen their seed-growing abilities. Throughout this process, they have built a strong, unified mission and community that revolves around cooperative principles and the common interests of Triple Divide's members.

In their orientation towards cooperation, pollination, and sustainable economic development, Triple Divide's members have set themselves up for collective success in increasing their seed production in coming years. While creating economic opportunity was not initially a priority for most members, it has become a foreseeable possibility. This is due, in large part, to the fact that members have taken ample time to lay the foundation for success: growing their skills in seed production while honing the co-op's policies and procedures. At the same time, they are increasing economic viability for members by employing three co-op members to do offseason work for the co-op (such as marketing, catalog maintenance, and seed packing).

As Triple Divide has only recently begun to focus on growing their economic impact, most members admitted that they were making very little money from seed production for Triple Divide so far. This relates more to the growers than to the co-op itself: most members' enterprises are not focused primarily on seed, or have small seed operations. Most, however, anticipate growing their seed production in coming years, and see the possibility for significant economic benefit through Triple Divide.

Through their mission-driven and unified orientation, Triple Divide has intentionally and effectively built democracy and equal economic opportunity into their structure. Due to this, my sense is that Triple Divide offers a cooperative model that is more likely than MPGC to meaningfully transform our food system. Though it is too soon to predict whether Triple Divide will contribute significantly to Montana's local economy, the co-op has successfully enacted the core principles of both cooperatives and sustainable economic development. This approach is likely to lead to members' economic success in the future, and sets Triple Divide up for success as a pollinator enterprise.

Element Three: Program Evaluation

Through a formal evaluation of Community Food and Agriculture Coalition's (CFAC) "Community Food Project," I learned the importance of reflection for creating stronger designs and processes in the future. Not only was the evaluation important for reflecting on CFAC's internal processes and relationships with program partners, but also from a democratic perspective: the evaluation gave a voice to the opinions and reflections of those who might not otherwise have been asked about their experience of the Double "Supplemental Nutrition Assistance Program" (SNAP) Dollars program.

For example, the project coordinator perceived the Street Team as a significant time investment offering little return for either the program or the Street Team. From her perspective, the Street Team was not worth pursuing in future years. Without an evaluation, this conclusion might have led CFAC to eliminate the program completely, assuming it to be a failure. The evaluation tested this assumption by gathering the perspectives of Street Team participants. Through this, CFAC discovered that being part of the Street Team profoundly influenced many of the participants, who expressed that their Street Team activities helped them feel they were meaningfully contributing and connected to their community and food system. The Street Team conferred a sense of value and professional development in participants' lives, while also providing them with direly needed economic support. Street Team participants provided targeted, specific suggestions for how to improve the Street Team in the future. Without the evaluation, CFAC might have overlooked perhaps the most important perspective of the Street Team: that of the Street Team participants themselves. Their input was crucial for shaping how the program can be most impactful in the future in terms of building self-reliance, which, in turn, creates greater access and a more resilient local economy.

I have observed that in academia and the nonprofit sector, we sometimes get stuck in our own analysis while losing sight of the big picture. This was evident during meetings with the evaluation team, who guided the general line of inquiry and methodology of the evaluation. Often, the

evaluation team's discussions regarding community self-reliance led to the conclusion that programs such as Double SNAP Dollars are not truly meaningful, because they do not fully address the root cause of food insecurity—the poverty cycle—and perhaps are not even worth pursuing. Coming from a group of community food advocates, this was indeed a gloomy projection. What would have been the future of the program after this conclusion? Whatever the case, it is crucial to elevate the voices of the people who rely on public assistance—especially in the face of a current national political administration led by people who are largely unsympathetic to social services—so that the alternative food movement can effectively support people in need.

The evaluation allowed the team to return from the precipice of despair by broadening their perspectives to include those of people using the Double SNAP Dollars program, a wide range of whom felt deeply impacted by it. Double SNAP Dollars incentives provided program users with a significant enough amount of money that they felt able to participate meaningfully at farmers markets, and gave them a sense of financial stability and access to better nutrition. Perhaps most profoundly, buying food at the farmers market helped Double SNAP Dollars users feel not only dignified, but also connected to and invested in their community.

Without an evaluation, much of the richness of this information from Double SNAP Dollars users would have been lost. CFAC may have made decisions without fully understanding the benefits of the program for the people who use it. By soliciting and taking into account diverse stakeholders' feedback, the evaluation exercised democratic values and laid the foundation for a stronger program in the future. Next year, the program will be informed by the perspectives of many, rather than relying on the limited view of those administering the project. While challenges remain, this evaluation is one important, if incremental, step towards building a resilient local economy in a complex system of interconnected problems.

Reflections: Learning, Successes, and the Future

In completing the elements of my portfolio, I have learned innumerable lessons and challenged myself in a variety of capacities. While I discovered many common threads in my learning, one particular point stands out: Just start. As a perfectionist by nature, I have always struggled to jump into new projects before feeling completely prepared and knowledgeable. But with each portfolio element, I realized the importance and necessity of *just starting*. This epiphany has led me to be happier and more confident, efficient, and flexible in my work. It has also freed me to experience challenges and hiccups in my process, but rather than viewing these as personal failures, I have come to appreciate that they are part of the ongoing, recursive practice of building skills and learning. And through this practice, I have become embedded in western Montana's local food community over the course of two short years.

Element One: Business Plan

In creating a business plan for Mirthful Farm, I quickly learned the importance of immersing myself in a community to build a strong network: entrepreneurs do not succeed alone, and benefit greatly from the experience of others. I met many individuals who were highly supportive and provided meaningful suggestions for how to improve my ideas. I found people's generosity and willingness to share their experiences and knowledge to be humbling (a theme that I found to be true in each of my portfolio elements). I also asked more people than ever before for help, and learned to apply new knowledge quickly, which was especially important given my unfamiliarity with the particulars of building a business. At first, this unfamiliarity felt highly uncomfortable, and I had little confidence in expressing my ideas, even in undergraduate-level business courses. As I gained support from mentors and others in Missoula's entrepreneurial community, I pushed myself to trust my abilities and knowledge. I learned that this mindset—*not* necessarily an in-depth understanding of accounting or a degree in marketing—is the heart of entrepreneurial success.

The more familiar I have become with the entrepreneurial community, the more I comprehended the critical role of feminism in business. I have learned that it is crucial to bring attention to and challenge my and others' internalized feeling that women, including myself, do not deserve a place at the table. In a male-dominated field that almost always rewards masculinity, I have become deeply interested in advocacy for women entrepreneurs and leaders.

Element Two: Co-op Case Studies

Prior to graduate school, I had never conducted rigorous qualitative research. The subject matter, philosophies, and methods were completely unfamiliar to me. In taking Research Methods for Social Change and conducting two case studies under the guidance of Lake County Community Development Corporation's Brianna Ewert, I became enamored with qualitative, social science research. I immediately realized the value of examining a subject through a context-based, individualized lens, and enjoyed the process as I delved into case studies. Through Research Methods and these case studies, I gained experience in formulating a research question around theory, concepts, and the guidance of the data from interviews themselves. I learned how to write an effective interview guide through wording that treads the line between avoiding redundancy and promoting richness of responses in interviews. One of the new skills I appreciate most, and worked the most diligently to develop, is interviewing people in a way that is warm and sincere but impartial and free of leading questions. I also developed the skill of transcribing interviews, and built on my ability to synthesize and present data in meaningful and varied formats.

Over the course of my two case studies, I interviewed 20 farmers. Each time I interviewed somebody new, I was surprised and delighted by their depth of knowledge, sense of community, and many aptitudes. These farmers helped me understand that transforming our food system is place-based and contextual, and that a spirit of incrementalism and thrift are necessary on the journey to a more resilient food system. Often, farmers mentioned how much they appreciated being interviewed, because the process led them to feel a renewed sense of purpose and direction. This was some of the most rewarding feedback I received.

Through my struggle to understand the inner workings and tensions of two different cooperatives, I came to realize that the process of starting an enterprise is often messy and imperfect. This very fact, though, encapsulates the joy of qualitative research: every situation, every subject, is unique and rooted in context. When I first learned this principle in Research Methods, my interpretation was that since every situation is different, we cannot learn anything from other situations. I now possess a more nuanced understanding: We should *not* attempt to broadly apply one example in every situation, but we *should* learn from a wide variety of situations while being aware of their unique contexts. Much of this understanding arose through studying the MPGC and Triple Divide. I am happy to have conducted research that places organizations in their social and geographical contexts and, as such, will contribute meaningfully to a greater understanding of cooperatives embedded in a regional food system.

Element Three: Program Evaluation

Program evaluation, like qualitative research, was a completely new professional endeavor for me. As the designer and manager of the evaluation, I gained new levels of responsibility, from assembling an evaluation team comprised of experts in western Montana's food system to facilitating meetings to designing a nine-month project timeline. I learned how to be a compassionate interviewer while talking with a range of people who use public assistance about their personal struggles, and in hearing about their experiences, and developed new insights into the dimensions and implications of poverty in western Montana. This experience gave me a sense of deep commitment to telling the stories of these individuals in a way that would meaningfully impact the future of the DSD program in western Montana and beyond. Simultaneously, my role as evaluator pushed me to view the program through a critical, analytical lens in order to provide constructive recommendations for CFAC. I often grappled with this balance. Though I did not achieve a flawless evaluation, I learned how to navigate the limits of my role as evaluator, as well as the limits of the resources allocated to the evaluation.

Throughout the evaluation, I improved at various skills: writing and analyzing surveys; facilitation; communication with program partners, farmers market vendors, the evaluation team, and DSD users; and writing and reporting results in a meaningful and engaging manner. More importantly, in working with a wide range of people in western Montana, I learned that it takes time to gain the trust of community members, identify key stakeholders, and ultimately become immersed in a community. I will carry this lesson forward into my future work.

The Future

I envision my life's work revolving around food system transformation and building resilient local economies. I would like to be a pollinator, teaching others how to create change in their own communities. The elements of my portfolio have helped me learn, on an applied level, organizational strategies for creating change in the food system and beyond. Many potential paths lie ahead of me, and my portfolio work has opened new doors for my future. By creating a viable business plan, I experienced the design phase for a values-oriented business and gained new skills and mentors that could support future work in business and organizational planning. By closely examining the challenges and successes of the implementation phase for two cooperatives, I learned about ways to support the growth of cooperatives and other alternative economic entities in my community. By conducting a formal evaluation and understanding the process and importance of reflection, I laid a foundation for success in my personal goals and in helping other enterprises be more successful in achieving their goals. I am confident that my learning in the Environmental Studies Master's Program will support me in my future endeavors.

REFERENCE

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