

# 4.4 CSA Administration

Lecture Outline	3
Appendices	
1. Example of Shareholder Contact Information	5
2. Example of Shareholder Billing Information	7
3. Example of Financial Report	9



# Lecture Outline: CSA Administration

## A. Essential CSA Administration Activities

1. Recruitment, advertisements
2. Correspondence with current membership
3. Billing
4. Database creation and ongoing management
  - a. Member contact information
  - b. Distribution of shares

## B. Time Required for CSA Administration

1. Time varies depending upon complexity of CSA

## C. Who Does Administrating?

1. Farmer
  - a. Advantages
    - i. Opportunity to build relationships with membership through direct contact
    - ii. Possible with small CSAs
  - b. Disadvantages
    - i. Often impossible to do both farming and administration of CSA. Can lead to reduced quality of work in both areas.
    - ii. Inadequate skills or lack of desire to manage database and accounting, leading to disorganization and dissatisfaction among membership
2. CSA Office Manager
  - a. Advantage: Dedicated position for managing the communication with members, billing, etc.
    - i. Frees farmer to focus on growing food
    - ii. Opportunity to build relationships between CSA Office Manager and members
    - iii. Often necessary with larger CSAs
    - iv. Farmer maintains contact via newsletter and special events
    - v. CSA Office Manager can be the bridge between the farmer/s and member
  - b. Disadvantage: Is there enough money to support this position?
3. Members/Volunteers
  - a. Advantage: True community support of agriculture by having members actively participate in overall management of the CSA
    - i. Greater communication, stronger relationships
    - ii. More sustainable for all by having different jobs covered by the members
  - b. Disadvantage: There can be difficulties if the member(s) or volunteer does not do a good job
  - c. Compensation for participation in administrative responsibilities (and other activities)

## D. Database Management

1. Software options (e.g., FileMaker Pro, Excel)
2. What data is tracked
  - a. Contact information (see Appendix 1: Example of Shareholder Contact Information)
    - i. Name, address, phone numbers, email address
    - ii. Type of share (whole share, half share, etc.)
    - iii. Pick-up site and day

- iv. Length of membership
  - v. Shareholder list
- 3. Billing and payment tracking (see Appendix 2: Example of Shareholder Billing Information, and Appendix 3: Example of Financial Report)
  - a. Type of payment (payment in full, installments, monthly)
  - b. Post-dated checks
  - c. Low-income share, complimentary, or work trade
  - d. Billing list
  - e. Payment reminders (calls, emails)
- 4. Sign-out sheets for tracking pick-up
- 5. Mailing labels
- 6. Distribution organization
  - a. Location
  - b. Day and time

#### **E. Distribution of Shares**

- 1. Types of distribution
  - a. On-farm pick-up models
    - i. Parking
    - ii. Set up, monitoring, breaking down
    - iii. Surplus and Exchange tables
    - iv. Example: UCSC Farm and Garden CSA
- 2. Off-farm pick-up models
  - a. Pick up packed boxes at farmers' markets
  - b. Grower produces bulk items and packing list with individual member pack
  - c. Grower produces and ships in bulk to urban distribution hub. Members pack and redistribute to neighborhood clusters, where members rotate pack and distribution responsibilities.
    - i. Example: Live Power CSA: Rural/city cluster groups

# Appendix 1: Example of Shareholder Contact Information (in FileMaker Pro)

## UCSC Farm & Garden CSA Shareholder Information

- Main Menu
- Billing Info
- Contact List

Primary Shareholder : **Jane** **Shareholder**  
First Name Last Name

Co-shareholders : **joeshareholder@csa.net**  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Entered :  
 Last Modified : Dec-8-04  
 Modified By : CSA Manager

Cancelled?

Cancellation Info

Contact Info : \_\_\_\_\_ | \_\_\_\_\_ | \_\_\_\_\_ | **jshareholder@csa.net**  
Phone Alternate Phone Fax E-mail Address

Mailing Address : **123 Farmscape Way** | **Fairview** | **CA** | **99999**  
Street City State Zip Code

Type of Share : **HALF SHARE**  
 Start Date This year : \_\_\_\_\_

Usual Pick-up Day : **TUESDAY**

Temp Pick-up Day : \_\_\_\_\_

Member Notes :

Switch As Of When? \_\_\_\_\_

Switch Until When? \_\_\_\_\_

Member Since  
**Mar 00**

Switch Pick-up ?  
 Current Pick-up : **Tuesday**



# Appendix 2: Example of Shareholder Billing Information (in FileMaker Pro)

## UCSC Farm & Garden CSA Billing Information

- Shareholder Info
- Contact List
- Billing List

Primary Shareholder : Jane Shareholder Entered :  
*First Name* *Last Name* Last Modified : Dec-8-04  
 Modified By : CSA Manager

Type of Share : HALF SHARE Total Due : \$380.00 Current Balance : \$0.00  
 Billing : Standard Two Payments (Use ONLY to manually override  
*Level* *Payment Plan* *Special Cost* automatic share cost calculation!)

Payment History

Post-dated Checks?  Yes

Date Received	Check #	Check Date	Paymt Amt	Donation	Donation Toward	Deposited?	Date Deposited	Receipt #
Dec-8-03	1234	Nov-11-03	\$190.00			<input checked="" type="radio"/> Y <input type="radio"/> N		
Dec-8-03	1235	Jun-1-04	\$190.00			<input type="radio"/> Y <input checked="" type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
						<input type="radio"/> Y <input type="radio"/> N		
Totals :			<u>\$380.00</u>					

Billing Notes





# Appendix 3: Example of Financial Report

(in FileMaker Pro)

PS Full Name	Ck Num	Ck Date	Date Received	Payment Amt	Donation Amt
Jane Shareholder	1234	Tuesday, November	Monday, December 8,	190.00	
Joe Shareholder	0729	Tuesday, June 1, 200	Monday, December 8,	380.00	
Frank Shareholder	8603	Tuesday, October 21,	Monday, December 8,	380.00	
Doris Shareholder	4743	Saturday, November	Monday, December 8,	190.00	
Thomas Shareholder	1234	Saturday, November	Monday, December 8,	380.00	
Karen Shareholder	1868	Friday, October 31, 2	Monday, December 8,	300.00	
Greg Shareholder	1688	Friday, October 31, 2	Monday, December 8,	190.00	
Sofie Shareholder	1143	Tuesday, October 28,	Monday, December 8,	300.00	
Lynne Shareholder	1680	Monday, November 1	Monday, December 8,	150.00	
Joni Shareholder	1285	Tuesday, June 1, 200	Tuesday, June 15, 200	300.00	
Leah Shareholder	227	Tuesday, June 1, 200	Friday, June 4, 2004	600.00	

