

# **A STUDY OF THE FARMERS' MARKET SECTOR**

in the United States:  
programs, regulations and  
emerging opportunities  
for the Australian sector

An International Specialised Skills Institute Fellowship.

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# i. Executive Summary

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## Background

The farmers' market sector in the United States has been thriving for over 40 years whereas the farmers' market sector in Australia was established only 15 years ago and has been developing since then.

In mid-2017, the Fellow investigated US farmers' market organisations and their systems and processes in managing farmers' markets to gain information and methods for the further development of the Australian farmers' market sector.

The Fellow visited over 28 farmers' markets across California, Philadelphia and New York City and adopted a qualitative research approach to data collection including participant observation with several farmers' market organisations, and shadowing of, and interviews with, key stakeholders. The Fellow also spent a week at a certified organic market garden to gain insights from a producer participating in their local food system.

## Fellowship Key Learnings

The Fellow acknowledges the difference of scale, population size and systemic societal contexts and challenges between the US and Australia. The key learnings from the US are not necessarily able to be directly applied to the Australian farmers' market sector due to contextual differences, however much can be gained from the systems and processes applied to addressing issues or implementing certain initiatives.

## Operations:

Every farmers' market visited by the Fellow was weekly in frequency and the number of stalls at each market varied pending the location and needs of the surrounding neighbourhood. Many farmers' markets were often located in streets or other highly accessible locations, close to public transport.

Farmers' market organisations administered yearly application forms and reviews of producer attendances across their marketplaces. Formal committees and meetings between the producers and organisations were also commonplace.

Complexities exist with individual organisation efficiencies and method of stall fee collection due to most US farmers' markets now being linked with the Federal food assistance program, Supplemental Nutrition Assistance Program, requires extensive reporting and reconciling.

## Integrity and Regulation:

Regardless of government regulatory involvement, the integrity of a farmers' market can be maintained and held to a high level of transparency if the organisation or farmers' market operator practices these values, as demonstrated by Greenmarket in New York City through their Inspections Program. The legislation and regulation of the farmers' market sector in California is important given the enormity of the sector across the State. The legal framework provides support to organisations that take action against fraudulent producers but the inefficiencies and inconsistencies of the bureaucratic processes were evident.

**Programs:**

Across the US farmers' markets visited, numerous approaches by farmers' market organisations or partners to implement social impact programming were built around the market day activities and trade. Programs varied from simple market day initiatives through to State and Federally funded programs. Key programming addressed aspects of education, youth empowerment, future of farming and accessibility to healthy, nutritious food.

**Emerging Opportunities:**

- » Statistics on the ageing farmer population and the forecasted food requirements of rapidly expanding metropolitan areas indicate that the issues surrounding the future of farming in Australia are at a critical point and need to be addressed.
- » The role of government in supporting the sector along with further research and collaborations and partnerships with aligned organisations will assist the farmers' market sector to implement programs that could start to problem-solve and address issues from a bottom-up systems approach. Succession planning, beginning farmer programs and food access initiatives are all examples that were observed in the US farmers' market sector.
- » Emerging opportunities within the farmers' market sector can positively contribute to developing a more resilient local food system and address certain issues of food, farming and land security.

## ii. Abbreviations and Definitions

### Abbreviations / Acronyms

<b>AAP:</b>	Accreditation Assessment Panel
<b>ACNC:</b>	Australian Charities and Not-for-profits Commission
<b>AFMA:</b>	Australian Farmers' Markets Association
<b>AIM:</b>	Agricultural Institute of Marin
<b>BFI:</b>	Berkeley Food Institute
<b>CA:</b>	California
<b>CDFA:</b>	Californian Department of Food & Agriculture
<b>CPC:</b>	Certified Producer Certificate
<b>CSA:</b>	Community Supported Agriculture
<b>CUESA:</b>	Centre for Urban Education about Sustainable Agriculture
<b>DEDJTR:</b>	Department of Economic Development, Jobs, Transport and Resources
<b>FCAC:</b>	Farmer Consumer Advisory Committee
<b>FM:</b>	Farmers' Market
<b>GAF:</b>	George Alexander Foundation
<b>GMkt:</b>	Greenmarket

<b>ISS Institute:</b>	International Specialised Skills Institute
<b>MFm:</b>	Melbourne Farmers Markets
<b>NYC:</b>	New York City
<b>OSISDC:</b>	Outer Suburban/Interface Services and Development Committee
<b>SES:</b>	Socio-Economic Status
<b>SMFM:</b>	Santa Monica Farmers' Markets
<b>SNAP:</b>	Supplemental Nutrition Assistance Program
<b>US:</b>	United States
<b>USDA:</b>	United States Department of Agriculture
<b>VFMA:</b>	Victorian Farmers' Markets Association

### Definitions:

**Accredited Farmers' Market:** When a farmers' market is accredited, it will display a VFMA accreditation symbol ('look for the tick of authenticity'). For farmers' markets in metropolitan areas to gain accreditation, at least 90% of their stallholders must be accredited; for regional farmers' markets, 75% of the stallholders must be accredited. These markets support and endorse accredited stallholders.\*

\* Victorian Farmers' Market Association, 'Accreditation', Victorian Farmers' Markets Association [website], 2018, <<https://www.vfma.org.au/Main/About/Accreditation.aspx>>, accessed 3 February 2018.

# 1. Fellowship Background

## Context

In the US, the farmers' market sector has been thriving over the past 40 years whereas in Australia, has developed significantly over the past 15 years. There is much to be learned from the US about how farmers' market organisations are structured and their implications for how markets are run in Australia. The Fellow investigated US farmers' market organisations and their systems and processes in managing farmers' markets to gain information and methods for the further development and impact of the Australian farmers' market sector.

Throughout the travels, the initial objectives of the Fellowship broadened, particularly when considering the emerging opportunities and programming possibilities for the sector to move beyond its traditional activities and structures.

## Methodology

The research adopted a qualitative approach to data collection to capture the detail and nuances of farmers' market management and the challenges and opportunities facing diverse organisations within the farmers' market sector. As such, the Fellow engaged in participant observation with several farmers' market organisations and on related businesses as well as semi-structured interviews with key stakeholders within the sectors. These included:

- » Engagement with farmers' market organisations through the shadowing of key staff members, individual interviews and farm visits. Attendance and note-taking on market days and informal discussions with market day managers were frequent.

- » 5 days with Santa Monica Farmers' Markets including market visits
- » 2 meetings with Ecology Centre and market visits
- » 1 scheduled meeting with CUESA and market visits
- » 5 days with Agricultural Institute of Marin
- » 2 days with The Food Trust
- » 7 meetings at Greenmarket and market visits
- » 1 meeting with Greensgrow
- » 1 meeting with Stone Barns Center for Food and Agriculture
- » 1 meeting with Berkeley Food Institute
- » A week-long stay on a certified organic market garden in California.
- » 28 farmers' markets were visited (including several attendances at numerous locations).

## Fellowship Travel Period

Prudence travelled to the US for 10 weeks from June 11 to August 20, 2017.

## Biography:

**2009-2012:**

Bachelor of Environments (major Environmental Science), University of Melbourne, Parkville

**2013-2016:**

Office Manager, Melbourne Farmers Markets

**2016-present:**

Business Manager, Melbourne Farmers Markets

**2017:**

Steering Committee Member for 2018 Urban Agriculture Forum

Working Group Member, Farmer Incubator

**2017-present:**

Accreditation Assessment Panel member, Victorian Farmers' Markets Association

**2018-onwards:**

Masters of Food Systems and Gastronomy, William Angliss Institute, Melbourne

## Memberships:

- » Industry Stakeholder, Victorian Farmers' Markets Association
- » Individual Member, Sustain: The Australian Food Network



## 2. Fellowship Learnings and Considerations

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The Fellow would like to acknowledge three caveats surrounding the learnings and considerations of this Fellowship Report:

1. There are notable differences between local food systems in the US and Australia when considering relevance, scalability, application of learnings such as: population, agricultural growing capabilities and industry structure, government subsidies.
2. Considerations and recommendations are formed based on the experience and knowledge of the Victorian farmers' market (FM) sector, which includes:
  - » The existence of an accreditation program through the Victorian Farmers' Markets Association (VFMA), of which the Fellow sits on the Accreditation Assessment Panel (AAP).
  - » The agricultural landscape, production and industries are primary consideration to the Victorian context.
  - » Knowledge and experience of the barriers, opportunities and structure of Melbourne metropolitan FMs compared with regional Victorian FMs.
  - » Before undertaking US travels, the Fellow had previously identified numerous limitations and opportunities for FMs in Victoria; consideration of the ageing population of farmers, mental health issues in the farming community, barriers for new and beginning farmers etc across Australia.
3. The Fellow is the Business Manager of Melbourne Farmers Markets (MFM), a not-for-profit company limited by guarantee with a Board of voluntary Directors. MFM is recognised as a certified social enterprise through Social Traders. To

the knowledge of the Fellow, MFM is one of two FM organisations of this structure in Australia, along with the Harvest Community Farmers' Market in Launceston, Tasmania.

MFM presently operates six metropolitan-based accredited FMs, equating to approximately 20 markets per month. Certain practical applications of learnings may be more suited to organisations running multiple FMs, and/or with a similar organisational structure.



**The Fellow has identified the following priority areas for the Victorian farmers' market sector. Learnings and considerations for each of these priority areas are detailed in the subsequent sections of this report.**

## 1. Best Management Practice

The Fellow travelled to the United States to understand the organisational structures and internal systems and processes of not-for-profit FM organisations- nearly all of which had a 501(c)(3) charitable status.

In Australia, the FM sector is currently consists of varying structures including community organisations, local councils, for-profit businesses and not-for-profit (limited by guarantee and incorporated) companies and organisations. To the knowledge of the Fellow, none of the companies and organisations that operate FMs as their core business have obtained charitable status.

Since the FM sector emerged 15 years ago in Victoria, FMs have been structured to operate primarily as monthly weekend events. This also stands true across Australia. The Fellow identified this monthly trend as a limiting factor to the consolidation and strength of the Australian sector, prior to undertaking her Fellowship travels.

The following variables may have contributed to this characteristic of the sector:

- » location and dispersal of neighbourhoods and communities (creating a circuit)
- » population density and dispersal
- » scale of farms not being set up or appropriated for direct sales
- » business model of farms
- » capacity of individuals or organisations operating the events
- » limited patronage

- » lack of emphasis on farmers' markets as a mechanism for education
- » regulatory frameworks including permits

The Fellow has detailed how these variables apply to the US context throughout the learnings, with considerations for the Australian and/or Victorian context.

### i. Organisational Structures of Farmers' Markets

#### US learnings:

Most organisations visited have a two-fold mission (detailed in Table 1) relating primarily to:

1. access to nutritious fresh food for the population and
2. security for the farming communities in the surrounding regions.

In Section 3. of this Report, the various programs detail the strategies and programs implemented to achieve these missions. Five of the six US organisations that the Fellow connected with were charitable organisations [501 (c)(3); see Table 1].

Table 1. Organisational Structure, Mission, Number of Markets

	Organisational Structure:	Mission:	# Markets:
California	Santa Monica Farmers' Market (City of Santa Monica, Government Organisation)	The Santa Monica Farmers Markets create thriving, vibrant communities that are inclusive, connected and diverse by promoting the preservation of the agricultural arts, prosperity of CA farmers and small food businesses and sustainable food systems. <sup>1</sup>	four weekly
	Ecology Centre (not-for-profit, 501(c)(3))	The Ecology Center's mission is to inspire and build a sustainable, healthy, and just future for the East Bay, California, and beyond. <sup>2</sup>	three weekly
	Centre for Urban Education about Sustainable Agriculture (not-for-profit, 501(c)(3))	CUESA is a tax-exempt 501(c)(3) non-profit organization founded in 1994 to educate urban consumers about sustainable agriculture and to create links between urban dwellers and local farmers. <sup>3</sup>	four weekly
	Agricultural Institute of Marin (not-for-profit, 501(c)(3))	To educate the public about the nutritional and economic benefits of buying locally grown food directly from farmers, and to connect and support communities and agriculture. <sup>4</sup>	seven weekly
Philadelphia	The Food Trust (not-for-profit, 501(c)(3))	The Food Trust's mission is to ensure that everyone has access to affordable, nutritious food and information to make healthy decisions. <sup>5</sup>	20+ seasonal weekly
New York	Greenmarket (GrowNYC, not-for-profit 501(c)(3))	Greenmarket was founded in 1976 with a two-fold mission: to promote regional agriculture by providing small family farms the opportunity to sell their locally grown products directly to consumers, and to ensure that all New Yorkers have access to the freshest, most nutritious locally grown food the region has to offer. <sup>6</sup>	50+ seasonal weekly

1 City of Santa Monica, 'Santa Monica Farmers' Markets', City of Santa Monica [website], 2018, <<https://www.smgov.net/Portals/FarmersMarket/>>, accessed 31 January 2018.

2 Ecology Centre, 'About', Ecology Centre [website], 2018, <<https://ecologycenter.org/about/>>, accessed 31 January 2018.

3 Centre for Urban Education about Sustainable Agriculture, 'About CUESA', Centre for Urban Education about Sustainable Agriculture [website], 2018, <<https://cuesa.org/about-cuesa>>, accessed 31 January 2018.

4 Agricultural Institute of Marin, 'Our Story', Agricultural Institute of Marin [website], 2018, <<https://agriculturalinstitute.org/our-story/>>, accessed 31 January 2018.

5 The Food Trust, 'Our Mission', The Food Trust [website], 2018, <<http://thefoodtrust.org/about/mission>>, accessed 31 January 2018.

6 Grow NYC, 'Greenmarket', Grow NYC [website], 2018, <<https://www.grownyc.org/greenmarket>>, accessed 31 January 2018.

The Fellow observed lack of oversight of certain areas of systems and processes for FM operators that were part of a parent organisation such as the Santa Monica Farmers' Market (SMFM) in the City of Santa Monica and Greenmarket (GMkt), one pillar of GrowNYC, 'the sustainability resource for New Yorkers'<sup>7</sup>:

- » SMFM had certain restrictions over the use of their market social media profiles and accounts. This was noted by one of the market managers as being somewhat limiting and inefficient as content was being double-handled and would often lead to misinformation being shared across their extensive platforms. This drawback seems nominal considering the SMFM is a department of the City of Santa Monica, receiving a secure yearly budget allocation for their operations. This minimises the reliance on stall fees and grant/philanthropic funding opportunities to meet their operational costs. This structure also enabled a platform for the City of Santa Monica to have a regular presence at the markets to engage with the community and promote their campaigns and initiatives i.e. battery recycling, recycling programs in other locations, events upcoming and more.
- » GrowNYC has a top-down systems approach to be adopted by each pillar (i.e. GMkt). The Fellow was informed by the GMkt staff of one limitation in this approach - the online communication platform used for public engagement required to be used was quite restrictive in terms of functionality, design and data analysis.

### Considerations for the Australian context:

1. Greater transparency is needed across the Australian farmers' market sector in relation to organisational structure and missions of market operators. Almost nine out of ten Australians want to support and engage with companies and businesses operating ethically<sup>8</sup>. If FM organisations can improve their

<sup>7</sup> Grow NYC, 'The Sustainability Resource for New Yorkers', Grow NYC [website], 2018, <<https://www.grownyc.org/>>, accessed 10 February 2018.

<sup>8</sup> L. Michael, 'Australians Express Strong Support for CSR', Pro Bono Australia [website], 8 January 2018 <<https://probonoaustralia.com.au/news/2018/01/australians-express-strong-support-csr/>>, accessed 31 January 2018.

messaging to consumers about the positive flow on impacts of spending at FMs, the higher likelihood there is of getting Australian consumers to shift their shopping habits from supermarkets to accredited FMs. The Fellow believes that this approach will be driven by best-practice amongst FM operators whilst the sector remains unregulated, however sees the opportunity for State bodies such as the VFMA to incorporate measures of transparency into the accredited market application process.

2. Due to lack of charitable status, the funding opportunities for not-for-profit companies such as MFM are limited when compared to US not-for-profit counterparts. MFM has been unsuccessful twice in applying for charitable (DGR) status with the Australian Charities and Not-for-profits Commission (ACNC). This shortcoming may be in part attributable to the 2012 inauguration of the ACNC to closely monitor and regulate the charity sector<sup>9</sup>, particularly given its substantial growth of tax concession charities by 1,451 in 2012 alone<sup>10</sup>. Lack of charitable status has been a barrier with countless shortcomings for government and private funding criteria. This hinders the potential impact of the sector economically, socially and environmentally. The Fellow will investigate why MFM has been unsuccessful, and if appropriate to re-address, apply for charitable status.
3. Eligible Australian farmers' market organisations should investigate identifying as a social enterprise and exploring certification through Social Traders. In early 2017, the Victorian State Government launched the nation's first Social Enterprise Strategy<sup>11</sup>. Funding opportunities in this Victorian sector are growing

<sup>9</sup> Australian Charities and Not-for-profits Commission, 'ACNC five years on: Reflections of the Inaugural Commissioner, Susan Pascoe AM' [website], 26 September 2017, <<http://www.acnc.gov.au/ACNC/Edu/CommissionerSusanPascoeAM.aspx>>, accessed 31 January 2018.

<sup>10</sup> M. Mandile, 'Not-for-Profit Brand and Brand Communications and Corporate Philanthropy in the U.S.', International Specialised Skills Institute [online journal], June 2016 <<http://www.issinstitute.org.au/wp-content/media/2016/09/Mandile-Final-LowRes.pdf>>, accessed 3 January 2018.

<sup>11</sup> Department of Economic Development, Jobs, Transport and Resources, Social Enterprise Strategy [website], February 2017, <[https://economicdevelopment.vic.gov.au/\\_\\_data/assets/pdf\\_file/0008/1435868/10371\\_DEDJTR\\_EDEI\\_Social\\_Enterprise\\_Brochure\\_A4\\_WEB\\_FINAL.pdf](https://economicdevelopment.vic.gov.au/__data/assets/pdf_file/0008/1435868/10371_DEDJTR_EDEI_Social_Enterprise_Brochure_A4_WEB_FINAL.pdf)>, accessed 2 January 2018.

as the Government recognises the need to support the invaluable work and contributions to community and individuals that social enterprises achieve and help to foster the establishment of more social entrepreneurship. Section 3 Programs touches on the social values/impacts that are often so implicit within FM organisations demonstrating why they are modelled as exemplary social enterprises.

4. Australian farmers' market operators develop broader missions to support their operations. As seen in the US, many of the organisations had a two-fold mission which integrated outcomes for the customers (health, accessibility, food security, education, community) and farmers (farming security, viable direct selling platforms, community, support). An overarching social and economic mission will broaden the scope for funding opportunities to implement programs and initiatives that achieve the objectives outlined above. For example, MFM is overtly farmer centric in achieving its mission and in being so, has established and supported a strong and trusted community of producers over the past 15 years. However, it could also define the health and well-being outcomes of customers and farmers in its mission.
5. There are advantages and disadvantages associated with FMs being part of a more regulated environment. Regulation may lead to access to greater resources; however, it can also lead to a less dynamic and agile operation due to the levels of bureaucracy and add significant costs to ensure compliance within a sector. This can also be said of FM activities being a part of a larger organisation, such as GMkt and GrowNYC which have a top-down approach to systems. The Fellow acknowledges that there is no definitive recommendation on which model is preferred (regulated / independent) and must be closely considered on a case-by-case basis according to what the community needs.

## ii. Market Frequency, Location & Size

### Learnings:

Every FM that the Fellow visited in the US was weekly in frequency and, in some locations, would operate up to four times a week. Many East Coast FMs were seasonal due to the weather extremities. FMs were held on any given day of the week and the time varied pending the location and neighbourhood. As indicated in Appendix 1, of the 24 key FMs visited by the Fellow, 89% were year-round markets with all operating on a weekly basis as a minimum and 21% operated more than once a week at that same location, further highlighting the contrast to the Australian weekend once-a-month market trend.

Most of the US FMs visited were situated in highly accessible locations, using under-utilised spaces such as one-way or no-through roads and freeway underpasses. Markets were extremely close to public transport and/or walking distance for the neighbourhood with cordoned-off streets. Markets that were less accessible or required a car were unsurprisingly located in more affluent neighbourhoods or municipalities. The type of programs that would run alongside the FMs, which are discussed further in the Report in Section 3, would vary pending the demographic and socio-economic status (SES) of the residential areas of the FM location.

A notable difference between FMs in the US and Victoria was number of stalls. While Victorian FM operators, particularly in urban areas, often aim for larger markets, many FMs in the US averaged 20-30 stalls. Anecdotal evidence from the Victorian FM scene is that patrons want choice, and they associate choice with visually a larger number of stalls.



*Popular commuter Tucker Square Greenmarket, New York City, New York*

Internally, the Greenmarket staff categorise their 50+ seasonal markets based on their customer audience: destination (Union Square, Rockefeller), commuter (Tucker Square/ Brooklyn Borough Hall) and neighbourhood (McClaren Park, Jackson Heights, Poe Park). These market distinctions are an apt way of aiding their decision-making processes with each category having characteristics (i.e. population density, SES, demographic etc) or needs for that market community. Similarly, in Melbourne, past student research that surveyed the post codes of customers demonstrated the difference between MFM markets such as the Collingwood Children's Farm Farmers' Market (destination) and Coburg Farmers' Market (neighbourhood).

### **Considerations for the Australian context:**

1. Weekly frequency in metropolitan/urban areas is key to the development of the farmers' market sector across Australia<sup>12</sup>. The weekly frequency of FMs in CA and NYC represents a clear contrast to the broader Australian FM sector. Establishing markets on days other than the weekend and with varying trading hours could lead to far greater impact and benefits for both producers (enter marketplace, build volume, take more return) and customers (improved convenience through continuity in frequency & increased accessibility to fresh produce).

Positively, there is a slow and steady growth of weekly accredited FMs in Melbourne (Flemington, Coburg, University of Melbourne, Eltham and Alphington FMs). This is supported by anecdotal evidence from free-range egg and vegetable growers: since transitioning the MFM run Coburg FM from a fortnightly market to weekly, there have been increased sales on a weekly basis in comparison to the fortnightly rotation. This is a good indication of the demand for local produce by neighbourhoods, if offered more regularly.

The Australian FM model must become more agile in a society of increasingly growing convenience and demand for ethically sourced fresh produce, such as the successful SAGE FM in Moruya, NSW, which is run on Tuesday afternoons from 3pm<sup>13</sup>. This consideration of increasing FMs to weekly is an area of sensitivity in Victoria, due to the following:

- » Feedback from numerous producers at Victorian accredited FMs state that there is a saturation of the marketplace and sales have been steadily downward trending.

<sup>12</sup> Outer Suburban/Interface Services and Development Committee, Inquiry into Farmers' Markets, October 2010, Parliament of Victoria, <[https://www.parliament.vic.gov.au/images/stories/committees/osisdv/Farmers\\_Markets/OSISDC\\_FarmersMarketsWEB15.10.10.pdf](https://www.parliament.vic.gov.au/images/stories/committees/osisdv/Farmers_Markets/OSISDC_FarmersMarketsWEB15.10.10.pdf)>, accessed 5 October 2017, p. 25.

<sup>13</sup> Sustainable Agriculture & Gardening Eurobodalla Inc, Sage Farmers Market, [website] <<http://sagefarmersmarket.org.au/>>, accessed 31 January 2018.



- » Inaccurate and deceiving use of the term 'farmers' market' to label a market that has wholesalers or resellers, thereby diminishing the integrity, and often return customers.
  - » The existing FM producers many of whom are nearing retirement are at capacity and not necessarily positioned to take on more markets<sup>14,15</sup> or mid-week markets.
  - » Customers have increased accessibility and convenience to sourcing local, ethical produce through platforms such as Community Supported Agriculture (CSA), food box schemes, home deliveries and resurgence of green grocers.
  - » Administrative and technological capacity of some FM organisers to coordinate weekly markets<sup>16</sup>
2. As demonstrated across CA and NYC, weekly FMs can be sustained, thriving and viable marketplaces by focusing on a smaller group of core farmers that offer sufficient choice in produce staples such as seasonal fruit, vegetables, free range eggs, dairy and meat, for that neighbourhood or community. The number of value-added food products (raw produce that has been transformed) at US FMs was minimal with a strong emphasis on farm fresh produce and the value-added products that were available, were made by the farmers. Based on the Fellow's observations at FMs across Victoria, Tasmania and Canberra, there is a high proportion of value-adding stalls that may well be supporting local producers in their ingredient sourcing but aren't necessarily the farmers themselves. The Fellow acknowledges the value of food business incubation and indirect support for farmers that these FMs offer; however value-added product stalls shift the focus away from the true essence and definition of what a genuine FM is, or should be. The Fellow sees the benefit of refocusing on fresh produce as most of the marketplace offering, to address compounding health issues and support needed for the farming communities. A ratio system

(certain number of farmers to value adders) may assist in guiding FM operators with this.

3. Farmers' markets in Australian metropolitan areas should focus on commuter and neighbourhood style FMs when establishing markets to capture a broader audience. Existing FMs to be categorised by audience catchment and use this distinction as an internal operational tool in determining how best to recruit/maintain stallholders, market trading days and hours, what additional programming may be suitable for that market community and increasing the customer base.
4. Increased support is needed from State and local Government to work closely with farmers' market operators to navigate regulative barriers and bureaucratic processes. This includes areas such as directional street signage permits, land use permits and site fee waiving where appropriate, health and safety regulations and traffic management. Farm Gate in Hobart is an Australian example of a wonderful, bustling closed-street marketplace and is what should be considered a benchmark for metropolitan areas. This consideration reiterates the recommendations seven and nine from the 2010 Inquiry into Farmers' Markets by the Parliament of Victoria Outer Suburban/Interface Services and Development Committee (OSISDC)<sup>17</sup>, which specified the State Government to reduce regulatory barriers for FMs and work with local councils to aid prime locations and access to amenities for FMs. This has yet to be addressed yet in Victoria.

### iii. Operations: Stallholder & Market Day Management

#### Learnings:

In conversation with Deb Bentzel, Associate Director of Community Food Systems at The Food Trust in Philadelphia, it was agreed that producer relationship management will always be a core priority of FM coordination. Technology can

14 Outer Suburban/Interface Services and Development Committee, loc.cit., p. 25.

15 K. Markow, S. Booth, S. Savio & J. Coveney, 'Improving access to community-based food systems: Comparing perspectives of low socioeconomic individuals and food system representatives', *Nutrition & Dietetics*, vol. 73, 2016, p. 22

16 Ibid.

17 Outer Suburban/Interface Services and Development Committee, op.cit., p. 12

be used to streamline systems and processes such as online payment systems, emailing, text messaging and internal market coordination; however, the relationship with each producer attending the markets needs to be nurtured; a direct dialogue, relationship, personal contact is critical in creating stronger marketplaces. It is important to understand as much as possible each producer and their business to best accommodate their needs with the service provided. The trade-off for this type of relationship management is that it is time-consuming and therefore costly, depending on human resources, in a poorly resourced sector.

### **Staffing:**

It was common practice for market day managers to work at up to three FMs a week due to the spread of market days and times of each organisation. It was clear that burn-out amongst staff contributed to high staff turnover, along with the seasonal nature of markets and casual staff required with this type of work.

GMkt employ five Regional Coordinators to directly manage, provide mentorship and support to the market day managers, many of whom are seasonal, casual employees. The full-time position of the Regional Coordinators is extremely important as this role provides a conduit between the decision making of the directors/management and what is happening on the ground across markets. Producers go to the Regional Coordinators if they have any issues or questions. It enables consistency and accountability across all levels. It also provides higher management position opportunities for market day managers that are looking to continue being involved / get a promotion.

Agricultural Institute of Marin (AIM) have a small team of predominantly full-time staff that each manage one or two FMs and have another specific role/responsibility within the organisation such as community outreach, children's education programs or operational support. AIM rotate market managers around to different FMs every three months or so which in part is to ensure that all market operations are known to staff as they generally have a high staff turnover. There was also a team of volunteers that would assist on market days.

### **Yearly Applications:**

All six FM organisations administered yearly applications required to be completed by all stallholders/vendors whether they were longstanding, returning or new attendees. This ensured the details for each producer and the produce that they were growing and/or planning to sell in the FMs was current. In California, this organisational administration closely aligned with the CDFA certified FM regulations and producer CPCs.

### **Market Coordination & Policies:**

In addition to the yearly application, GMkt have an annual review of FM attendance arrangements. This requires the producer to list what FMs they want to attend for the year ahead, regardless of how many years they have attended a FM. The decision-making process encapsulates a principle of seniority, so unless there was an egregious circumstance, long-standing producers will get priority for returning to a specific FM.

GMkt had a Farmer Consumer Advisory Committee (FCAC) consisting of 30 elected farmers and GMkt staff and engaged community members that meet once a month. The meetings add a level of democracy for farmers to talk through issues such as farm labour, GMO, inspections process, new markets. Since the FCAC's inception, GMkt staff indicated that the quality and integrity of the discussion and conversation points has notably improved as has the level of farmers looking to participate in the FCAC.

The Fellow observed active management of produce lines (i.e. restricting producers from selling certain produce) within each FM by the market operators. GMkt would record any restrictions in producer profiles on their database, specifying which FM the restrictions were applicable to and reviewed annually.

In January 2017, AIM implemented a Price Cutting Rule that eliminated producers from reducing their prices towards the end of the FM trading period. This was enforced because not only would the price cutting encourage customers to come



and shop later (and earlier customers losing out), but it would also create an unfair advantage for larger farms with more produce and capacity to cut their prices, which small farms are unable to compete with. This Rule had mixed responses from producers as one market day manager explained that bartering was part of the culture and nature of Asian and Indian demographics around certain FM locations so there is a need for ongoing review and dialogue with the producers and customers.

CUESA host an annual 'round table' meeting that they have made compulsory for producers across their four FM days, to attend. The purpose of the meeting allows CUESA to highlight new programs or initiatives they are working on and marketing efforts and to also solicit feedback from sellers on various CUESA projects or programs. They also communicate general updates to direct marketing Californian State laws and compliance issues.

#### **Stall Fee Payments:**

FM organisations had varying payment methods for producers to pay stall fees, which enabled flexibility in offering seasonal upfront payment options, discounts or imposing late fee payment or cancellation charges.

Most organisations have a flat stall fee; however, it was common practice in Southern California to incur a percentage-based stall fee, dependent upon the sales taken by a producer on a market day. SMFM had this type of payment system, which was set at 4.5%. The payment of stall fees following each FM was administratively laborious and required trusting relationships with producers in self-reporting the amount of produce sold on their load sheets. The benefits of percentage-based stall fees include producers not being financially disadvantaged by low patronage (i.e. poor weather day) or if produce quantities are waning due to seasonal transitions. Producers can make more informed decisions about whether to attend based on the approximate sales they will make on the volume of produce available. The Fellow does not foresee a percentage-based stall-fee payment system being implemented in Australia due to the absence of government

regulation and therefore enforcement of paperwork such as Load Sheets, the confidentiality of sensitive financial details of each business and the variability of income for FM organisations not being viable.

No online payment systems\* were being implemented in the FM organisations visited by the Fellow; however, several were investigating how it could be incorporated or view it as an ideal option. Due to producer stall fees often being intertwined with the intricacies of administering, reporting and reconciling the financial activity of the Federal Farm Bill funded Supplemental Nutrition Assistance Program (SNAP), it would be an extremely complex task to implement an integrated online payment system within these organisations. Administered through the United States Department of Agriculture (USDA), SNAP provides nutrition assistance to low income earners and families and is income that can be spent within the FM marketplace.

\*The Fellow does not consider direct debit payments to be a form of online payment.

#### **Considerations for the Australian FM sector:**

1. Introduce a yearly application process administered by each farmers' market operator, regardless of size or number of markets managed. Applicable to longstanding, returning or new producers and reviewing the attendance of each producer annually, practising the seniority principle.
2. Consideration should also be given to the VFMA accreditation assessment process. If each accredited producer application information could be made accessible to VFMA accredited FM operator's this would reduce the amount of paperwork required of producers attending FMs run by different operators and offer a strong incentive for operators to run accredited FMs. Whether this top-down approach may become prohibitive for market operators would need to be further explored.

3. Annual 'round table' meetings with producers to ensure that there is an open dialogue between management and vendors and not solely reliant on email updates to convey updates, compliancy or market issues. This could be applicable and useful to associations such as the VFMA or also market operators and organisations.
4. Given the importance of producer relationship management and the high staff turnover that often occurs within the FM sector, an integrated customer relationship management system would be a useful tool in ensuring that historical information (markets attended, produce restrictions, decision making logics, etc) about each producer is not lost as staff leave.
5. Implementing an integrated online payment system of stall fees. Consideration must also be given to the producer as the process cannot be exceedingly arduous for already time poor farmers and producers and appropriate support/guidance where necessary. Australia is better positioned to implement this type of system whilst the FM sector has an independent, relatively simply structure (no food assistance programs) and producers are more willing to adopt changes, in comparison to US farmers that have been attending the markets for up to 40 years and are less willing to change their market behaviours or systems. Over the past three years, MFM has streamlined internal processes and efficiencies through the transition to an online payment system.

## 2. Farmers' Market Integrity and Regulations

The term 'farmers' market' is often misinterpreted when referring to food, craft or wholesale markets, such as the Gleadell Street and Queen Victoria Market in Melbourne. The impression is that the traders are farmers themselves when, in fact, they source predominantly or entirely from the wholesale markets. This may simply be through lack of understanding or, alternatively, conveniently or deliberately perpetuated by commercial enterprises wishing to capitalise on the qualities associated with accredited farmers' markets. Although the VFMA

provides a clear definition of what constitutes an accredited farmers market, ongoing confusion suggests that increased outreach, education and stronger regulations with regards to using the term may be required.

### i. Regulation

#### Learnings:

Californian law defines a certified farmers' market as:

- a. Certified Farmers' Market. A location approved by the county agricultural commissioner of that county where agricultural products are sold by producers or certified producers directly to consumers or to individuals, organizations, or entities that subsequently sell or distribute the products directly to end users. A certified farmers' market may only be operated by one or more certified producers, by a non-profit organization, or by a local government agency.<sup>18</sup>

In contrast to California, the State of New York does not regulate the FM sector.<sup>19</sup>

In Australia, Victoria is currently the only state to have an ACCC registered accreditation program, and this is administered by the Victorian Farmers' Markets Association (VFMA)<sup>20</sup>. The VFMA was founded in 2004 and developed the accreditation program throughout the Victorian State Government's \$2 million FM Program. This initiative was administered by Regional Development Victoria (RDV) from 2007 to 2011 with the objective to "develop markets that can grow and operate as economically sustainable community events to bring local produce

<sup>18</sup> Thomson Reuters, 'Barclays Official California Code of Regulations; 1392.2. Definitions', [website], 2018, <[https://govt.westlaw.com/calregs/Document/I549A4530CF4E11E0A17EBD98F4264ABD?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=\(sc.Default\)&bhcp=1](https://govt.westlaw.com/calregs/Document/I549A4530CF4E11E0A17EBD98F4264ABD?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=(sc.Default)&bhcp=1)>, accessed 27 January 2018

<sup>19</sup> D. Nosowitz, 'Stamping Out Farmers' Market Fraud', Modern Farmer, 6 October 2014 [website] <<https://modernfarmer.com/2014/10/curious-case-farmers-market-fraud/>>, accessed 27 January 2018

<sup>20</sup> IP Australia, 'Certification Market Rules', Victorian Farmers Markets Association Inc., [website], 24 May 2016, <[https://www.ipaustralia.gov.au/sites/g/files/net856/f/certification\\_rules/1757020\\_160601\\_initial\\_rules.pdf](https://www.ipaustralia.gov.au/sites/g/files/net856/f/certification_rules/1757020_160601_initial_rules.pdf)>, accessed 27 January 2018

direct from producers to consumers”<sup>21</sup> Since 2015 there has been an upward trend in the number of accredited VFMA members, with 656 current members, of which 21% are Specialty Makers.<sup>22</sup>

In recent years, the VFMA has encouraged Australian Farmers' Markets Association (AFMA) to initiate discussions with other state bodies and FM representatives to open dialogue with regards to a National standard or definition by which more states might move towards developing an accreditation program. This is strongly supported by some and deemed not necessary by others and remains inactive.

The VFMA accreditation program was strongly influenced by the Californian FM certification program, with relevance to the Victorian context.

The primary differences of the two programs:

- » The Californian certified FM program is governed by the State's Department of Food and Agriculture (CDFA) whereas the VFMA administers a certain level of regulation & compliance through the accreditation program, without the involvement of government enforcement.
- » CDFA certified producers only include fruit, vegetable, nut and flower producers as meat producers are required to go through USDA and value-adding food businesses are generally not permitted to attend certified FMs. The VFMA accreditation program includes all types of farm-based producers and accredits value-adding food businesses. Generally, the Victorian accredited FMs have a broader range of produce and food products available in the marketplace when compared with Californian certified FMs.

From interstate market travels and observations, certain strategies being adopted by market managers in other State's that are attempting to ensure integrity and transparency through individual programs such as:

- » The Adelaide Showground Farmers' Market (AFSM) in South Australia has a Producer Guarantee program that was developed with financial assistance from the Primary Industries and Regions SA (PIRSA) with the rights owned by AFSM Inc. The website states that they currently have 16 producers guaranteed and nine certified inspectors<sup>23</sup>.
- » The Capital Region Farmers' Market in Canberra has signage detailing what produce is being sold by the producer and what is produce/products have been approved by the Market Committee to be sold by an 'agent'. The website also states that farm/site visits are conducted to “ensure the authenticity of their production systems and suitability for the Market”<sup>24</sup>. A 2015 paper that explores the scale and malleability of 'local' in FMs, referred to the Capital Region Farmers' Market and several adaptations to the three pillars that determine the stallholder mix and eligibility criteria since the market's inception in 2004<sup>25</sup>. The Market is now based on an '80/20 rule with 20 per cent of market stallholders operating outside of the parameters of local and direct.’<sup>26</sup>

The Fellow is largely unaware of the effectiveness and veracity of these interstate programs in monitoring compliance.

### Considerations for the Australian and Victorian context:

1. Development of State or National legislation to define a 'farmers' market'. Increasingly, the term 'farmers' market' is being used as a 'marketing mechanism’<sup>27</sup> as no legislation exists across Australia to define what a 'farmers'

23 Adelaide Showground Farmers' Market, 'South Australian Farmers' Market Producer Guarantee', Adelaide Farmers' Market [website], South Australian Farmers' Market Producer Guarantee, <<http://www.adelaidefarmersmarket.com.au/www/content/default.aspx?cid=2271&fid=842>>, accessed 30 December 2017

24 Capital Region Farmers' Market, 'Market Rules', Capital Region Farmers' Market [website], Market Rules - Overview, <<http://capitalregionfarmersmarket.com.au/about-us/market-rules/>>, accessed 30 December 2017

25 B. Turner & C. Hope, 'Staging the Local: rethinking scale in farmers' markets', Australian Geographer, vol. 46, no. 2, 2016, p 11-12.

26 Ibid.

27 C. Saffer, 'First online farmers' market readies for launch', The Sydney Morning Herald, Business, July 27 2017, <<http://www.smh.com.au/small-business/startup/first-online-farmers-market-readies-for-launch-20170727-gxjsbh.html>>, accessed 27 January 2018.

21 Outer Suburban/Interface Services and Development Committee, op.cit., p. 27.

22 K. Archdeacon, email response to VFMA current membership totals, Tuesday 30 January.

market' is<sup>28</sup>. As the FM sector continues to strengthen and mature, this will also continue to become a contentious issue regarding the credibility of FMs i.e. similar to terms 'free range' and 'organic' that now hold much question into the genuineness.

2. In addition to consideration of legislation, a bottom up approach may be more effective. The Fellow suggests the VFMA to again approach local councils for endorsement of VFMA accredited farmers' markets, backed with recent data and findings on the impact and success of accredited FMs.
3. Reinstatement of annual National Farmers' Market conference. There have been two national FM conferences held in Australia, however these have not continued. Given the progression of the sector since this time, the reinstatement of an annual or bi-annual FM conference would be ideal. A meeting place for farmers' market organisations, managers and producers/stallholders to gather and discuss an agenda of Nation-wide issues, certain topics, barriers to growth etc, like conferences and workshops held by the Farmers' Market Coalition, which also has a substantial online resource kit for market managers and organisations. The VFMA currently has an annual Market Manager Workshop for accredited FM operators- this has been extremely well attended and received by the Market Managers, creating a stronger network and opportunity to capture state wide initiatives, challenges and successes of the FM sector.

## ii. Californian Certified Farmers' Market Program

### Learnings:

Program Administration at State and County level

California has approximately 800 certified FMs in operation with 2500<sup>29</sup> certified producers, servicing a population of over 39 million people. The CDFA oversees

the certified FM program with each County's Agriculture Commissioner office administering the paperwork, inspections and compliance. Given the scale of Californian sector, the Fellow sees this degree of regulation as necessary.



*Californian Department of Food and Agriculture market inspection at the Downtown Wednesday Farmers' Market in Santa Monica, California*

Certain inefficiencies of this system that were highlighted in meetings with Ed Williams, Deputy Director of the LA County Department of Agricultural Commissioner / Weights and Tyler Thayer, Farm Audit Program Director, AIM included:

- » Lack of standardisation across Counties with the producer certification costs, inspection/compliance resources allocation
- » Varying budgets for the FM program and therefore priority within each County

<sup>28</sup> Outer Suburban/Interface Services and Development Committee, op.cit., p.18.

<sup>29</sup> Californian Department of Food and Agriculture, 'Certified Farmers' Market Program', Californian Department of Food and Agriculture [website], 2017, < [https://www.cdfa.ca.gov/is/i\\_&c/cfm.html](https://www.cdfa.ca.gov/is/i_&c/cfm.html)>, accessed 30 December 2017.

- » Limited cross-County jurisdictional activity on producer/certification matters that are pertinent across two or more Counties

### Market Day Levies

In 2015, the producer market day levy increased from USD \$0.60 to \$2 to cover the costs of CDFA regulatory and compliance (paperwork and market & field inspections) work, in a bid to address inefficiencies such as those highlighted previously. This was in response to lobbying from farmers' market stakeholders and several damning articles/reports about the fraudulent activities occurring in certified farmers' markets.<sup>30,31</sup>

### Certified Producer Certificate (CPC):

The Agricultural Commissioner office of each Californian County issues producers with a CPC if they have met the application criteria to be a certified producer in the certified FM program. The CPC has an annual fee payable to the County that the produce is grown in (some producer's will have multiple CPCs if they have properties in more than one County). This CPC must be displayed at every certified FM attended - it is a violation to not display the CPC.<sup>32</sup> One Californian vegetable grower commented the regulations alone do not deter producers from cheating and currently, not enough resources are allocated to the actual enforcement of these regulations.

The program allows second certificates which permits certified producers to sell

30 D. Karp, 'Produce inspectors keep farmers markets honest', Los Angeles Times, Collections, 26 December 2013, <<http://articles.latimes.com/2013/dec/26/local/la-me-farmers-market-20131227>>, accessed 30 December 2017.

31 S.R. Wiseman, 'Fraud in the Market', Regent University Law Review [online journal], 2014, <[https://farmersmarketcoalition.org/wp-content/uploads/2014/10/Fraud-in-the-Market-Wiseman\\_vol\\_26\\_2.pdf](https://farmersmarketcoalition.org/wp-content/uploads/2014/10/Fraud-in-the-Market-Wiseman_vol_26_2.pdf)>, accessed 30 December 2017.

32 California Legislative Information, 'California Law; Code Search 47020, 47021', 2015 [website], <[http://leginfo.ca.gov/faces/codes\\_displayText.xhtml?lawCode=FAC&division=17.&title=&part=&chapter=10.5.&article=3](http://leginfo.ca.gov/faces/codes_displayText.xhtml?lawCode=FAC&division=17.&title=&part=&chapter=10.5.&article=3)>, accessed 30 December 2017.

the produce of another certified producer, at the discretion of the market operator and its market rules. Different strategies were adopted by FM organisations for undertaking and reviewing second certificates. Similar to the second certificates, GMkt have a 'Request to Purchase' process that enables producers to sell on behalf of another local producer with full disclosure amongst other vendors in that marketplace.

### Load Sheets:

Load sheets that quantify the volume of produce sold at any given certified FM, must be completed by each producer that attends a certified FM. Load sheets are collected by market day managers at the end of the market trading period and by law, must be held with the FM operator for 18 months.<sup>33</sup>

Load sheets present a strong opportunity for data analysis of the FM sector at a producer, organisation and even state-wide level. The collection of market day sales due to percentage-based stall fees enables SMFM to analyse the economic impact of their four markets. SMFM was in the midst of analysing their complete load sheet data to give an overall market and an individual producer report, to be later used to work with producers on improving their market day sales and also track the market performance. Without government regulation and enforcement, the Fellow cannot see that this form and extent of data collection would ever be applied to the Australian FM context.

### Considerations for the Victorian context:

1. VFMA accredited members to have a current accredited product listing / certificate visible on market days. This will enable market day managers to cross-reference the certificate with the products that are on the market stall. The outcome being better communication between VFMA and market day

33 Thomson Reuters, 'Barclays Official California Code of Regulations; 1392.9. Direct Marketing, Compliance Requirements for the Operator of a Certified Farmers' Market', [website], 2018, <[https://govt.westlaw.com/calregs/Document/I56A09C80CF4E11E0A17EBD98F4264ABD?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=\(sc.Default\)](https://govt.westlaw.com/calregs/Document/I56A09C80CF4E11E0A17EBD98F4264ABD?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=(sc.Default))>, accessed 30 December 2017.



managers who will be empowered by improved access to information to flag if there are products being sold that are not listed on a producer's certificate.

2. VFMA to review the shared farm stall arrangement for accredited primary producers and give consideration on a case by case basis, not solely on the number of people employed/income generated. The VFMA could also work more closely with FM operators to identify possible shared farm stall arrangements and recruitment in a bid to improve produce diversification across accredited FMs, particularly regional/rural based FMs.
3. Authorised representatives of farming businesses permitted to attend VFMA accredited farmers' markets. In the US and across other States of Australia, it is common for farmers or producers to have casual or regular representatives attending markets on their behalf of their business, including when the person has no connection or familiarity with the business. Whilst this is not permitted in the current VFMA accreditation guidelines, to the knowledge of the Fellow, the VFMA is exploring frameworks for stallholders by which authorised representatives can attend markets once they have been approved.

### iii. Farmers' Market Compliance Programs

The most significant issue of non-compliance that the Fellow identified as universal is produce supplementation. In addition to market managers being trained to recognise produce that may supplemented (i.e. uniformity), the main difficulty lies in assessing volume and whether the farmers' anticipating season volumes correlate with the volumes being sold on market day, farm size and percentage of that produce that is also sold through wholesale market, CSAs, restaurants etc.

#### » Farm Audit Program, AIM

In addition to the CDFA certified FM program, AIM implemented an independent Farm Audit Program in late 2010 to build in another further level of assurance that the integrity of their marketplaces and producers is maintained.<sup>34</sup>

Tyler Thayer, Farm Audit Program Coordinator at AIM with over 30 years' experience in the FM sector, believes that the accuracy of producer CPCs is now questionable and has become more of an honour system as the CDFA and County budgets do not cover the amount required for enforcement of the regulations in place.

The Farm Audit Program is extensive; it involves a very systematic approach to paperwork by the AIM team. It covers market day inspections, ongoing clear and documented communication between producer and AIM, site visits and follow up procedures as required. Thayer outlined some challenges in implementing the program: large farm businesses that were sited across hundreds of acres and numerous Counties and cultural / language barriers with the Asian and Hmong communities where produce supplementation was not considered as reselling within their communities.

Thayer referred to discussions with California's largest FM operator, Pacific Coast Farmers' Markets Association (PCFMA), who are also looking to implement a similar program to AIM, with collaboration an effective and appropriate outcome for the two organisations.

The Fellow sees that given multiple FM organisations in CA are developing and/or implementing their own programs to maintain integrity within their marketplaces, that the effectiveness of Government regulation and enforcement at County level is not adequate for a sector of this size. The Fellow considers the individual organisation programs as critical with the involvement of the Government allowing for the legal framework that FM operators can (usually) rely on in acting against fraudulent behaviour.

#### » Inspections Program, GMkt, GrowNYC

GMkt are recognised for continuing to professionalise the industry through their Inspections Program that ensures integrity and transparency across their 50+ seasonal FMs that accommodate for approximately 240 producers. The Fellow met with June Russell, Manager of the Farm Inspections Program and Strategic

<sup>34</sup> Agricultural Institute of Marin, 'Farm Audit Program', Agricultural Institute of Marin [website], 2018, <<https://agriculturalinstitute.org/farm-audit-program/>>, accessed 10 January 2018.

Development at GMkt to learn about the program. The Inspections Program has recently been reviewed and assessed via a third-party consultant. GMkt are still working through the report findings and considering what and how to change and/or implement of the recommendations.

Russell noted that the Inspections Program must remain focused on the parameters of GMkt, and continually referring to how it impacts the two-fold mission of the organisation (promoting regional agriculture and ensuring NYC residents have access to fresh, nutritious and locally grown food) otherwise the Program objectives can be at risk of being muddled particularly as most farmers have many other sales platforms and channels that may involve activity (such as supplementing) that is otherwise in conflict with the GMkt Rules.

Russell has noticed that there is a generational change happening, and younger farmers are less intimidated by the inspections process and paperwork which existing producers and older generations must to adapt to as the level of compliancy and regulation increases.

Interestingly, GMkt have a peer review procedure that enables stakeholders to lodge complaints if they suspect unprincipled activities from another producer. GMkt charge a \$US200-250 fee to the complainant to send an inspector out to investigate a farm and if they find a complaint to be valid, the money will be refunded.

### Considerations:

1. There are current limitations in the VFMA accreditation program. Rather than only responding to concerns of misconduct, cheating or supplementation of produce, regular farm and production site inspections/visits should be an integral part of the VFMA accreditation program. This would require development of a system for reporting, training of staff to carry out farm inspections and reallocation of resources to enable this to be built into the current program. The Fellow acknowledges that the above consideration is not only about ensuring

that the integrity, transparency and traceability is maintained with the accredited FMs. Farm/site visits and inspections will build in the opportunity to form strong producer-association relationships and respect, a deeper knowledge and understanding of the varying farming/business models, food production practiced across Victoria and sharing this information and images to the public as an education tool.

2. The farmers' market sector in Victoria is well-positioned to continue strengthening the integrity and transparency of farmers' markets through the VFMA Accreditation Program. However, the regulations and enforcement processes in CA do not seem suitable for the scale of the sector in Victoria or Australia. GMkt & AIM are strong examples of organisations that maintain integrity through the strict compliancy programs and farmer involvement/feedback through initiatives such as the GMkt's Farmer and Community Advisory Committee (FCAC), without the customary bureaucratic delays in processes that are often associated with Government. With consideration to certain scales such as number of producers and markets, the AIM and GMkt program elements and processes can be applied to the VFMA accredited program and current membership of over 600 producer and makers.
3. Build transparencies and accountability into market days through producer profiles. Farmers at CUESA Ferry Plaza and Jack London Square FMs each had their own producer profile that included their location on a map of CA and the history / current operations of their farm/s. This was a simple, yet extremely effective marketing tool implemented by CUESA, supported through their aim of completing at least two farm visits per month, to build in accountability of the producer to the shopper who has the information within eye-sight of their purchasing power.



### 3. Programs:

As observed across Victorian and Australia, FMs are not just a place of trade. FMs provide a multi-functional community space for social connectedness, education on produce, seasonal fluctuations and farming issues, live music or fun activities for children.<sup>35,36</sup>

US FM organisations were observed to have a far more comprehensive and strategic range of programming integrating with the FM activities. Program outcomes benefit the customers through education, social inclusion & equity and benefit the farmers through technical and marketing assistance, financial incentives and development/nurturing of beginning farmers.

#### i. Community Engagement

##### Learnings:

Across the various FMs visited, market day initiatives set out to engage with existing FM customers, encourage return and new patrons. Objectives varied, and the Fellow noted the simplicity of administering and seeming low cost for implementation of the following direct market day initiatives in addition to universal application:

##### » Veggie Valet Service, CUESA

Parking is extremely limited near the Ferry Plaza in San Francisco. A CUESA volunteer managed service allows customers to drop off their full produce bags or trolleys and then temporarily park in a designated zone next to the Veggie Valet marquee and collect their produce. This provides convenience for customers, but also addresses the issue of carrying about heavy, bulky produce

bags whilst still shopping in the market, thereby increasing the potential of overall sales in the market.

##### » Seasonal Shopper Rewards Card, CUESA

To encourage a variety of purchases in the marketplace and return customers, CUESA implement a straightforward incentive program. Customers get a paper card that is stamped by a CUESA staff member every time they purchase over 5 unique items from the market. When the customer has reached 10 stamps, they enter their card in the draw to win prizes and receive discounts to certain events<sup>37</sup>.

##### » Food Stories, demonstrated at Parkside Plaza GMkt

The market day manager had a non-intrusive, simple approach to engaging with the market community which was a great tool for conversation starters and recipe ideas. A food or produce related question written on a big piece of paper or board such as 'how do you cook these \*insert seasonal produce item\*?', then multiple pens available for customers to write their responses.

##### » Partnerships with Food Rescue Organisations

When the Fellow was volunteering on Happy Acre Farm and at the Jack London Square FM, a team of volunteers from a food rescue organisation came towards the end of market day with multiple crates for producers to fill with unsold produce donations. This is common practice across FMs visited and as an incentive for farmers to participate that may not otherwise have another platform to sell the produce via, the donated produce is tax deductible.

##### » Culturally appropriate marketing material and bilingual market day managers

GMkt provide market information flyers in a several different languages to account for their culturally diverse city and neighbourhoods. In neighbourhoods

<sup>35</sup> Melbourne Farmers Markets, 'Economic and Social Impact Report', Melbourne Farmers Markets, December 2016

<sup>36</sup> K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 20.

<sup>37</sup> Centre for Urban Education about Sustainable Agriculture, 'Seasonal Shopper Rewards Card', Centre for Urban Education about Sustainable Agriculture [website], 2018, <<https://cuesa.org/markets/seasonal-shopper-rewards-card>> accessed 7 January 2018.

that were predominantly non-English speaking, GMkt would ensure that their market day managers were fluent in that language i.e. Spanish or Chinese.

Several more in-depth programs had strong educational objectives:

- » Cooking & Food Literacy through PEACH project<sup>38</sup>: The Food Trust
- » Tailored cooking programs for children, facilitated via Summer school programs: CUESA
- » Tours: AIM Diggin' the Market & Farm Tours
- » Environmental programs: GrowNYC Zero Waste initiatives; food composting, textile recycling depots & Community Garden projects, City of Santa Monica recycling depot for batteries etc at SMFM info booths
- » Youth-specific programs: GrowNYC integrate the four pillars into programming that works to empower 30,000 school aged kids each year through initiatives such as Youthmarket<sup>39</sup>, 'recycling and sustainability programs, school garden initiatives and support, nutrition education, GMkt school tours, in-school curricula, environmental education, and much more'.<sup>40</sup>

### Considerations for the Australian context:

1. Programming at farmers' markets can be an influential tool in increasing the incentives and benefits for community members to attend, participate and/or purchase.

Pending the needs of the community that surrounds the FM, programs can vary with objectives (i.e. convenience, food or farming education) and in level of implementation; straightforward and easily administered by the FM operator

through to comprehensive, funding dependent with measured outcomes.

2. There is significant potential for the Australian farmers' market sector to develop programming that focuses on education. Youth should be a priority target audience of education programs in the FM sector, with exploration of alignments with the National teaching curriculum. The Stephanie Alexander Kitchen Gardens Foundation provides an example of successful local program that has been built into Primary School curriculum across Australia that is now expanding programs into Secondary schooling. Given that a significant number of FMs operate on school grounds, this provides an immediate pilot project opportunity for classroom learning objectives to incorporate the activities of the FM, broader farming and agriculture, fresh, seasonal produce and health eating, urban and regional communities.
3. Greater support is needed to assist and guide farmers' market organisations in identifying funding opportunities and that will build capacity to develop, manage and operate programs that have clear social outcomes.
4. VFMA or well-placed farmers' market organisations to forge strategic partnerships with existing social impact organisations or institutions that are already addressing certain issues to build further collaborations and impact for market day and beyond. Examples of alignments include Sustainability Victoria's Love Food Hate Waste initiative (food waste education), Youth Food Movement (food literacy), Fair Food Challenge (food waste education for university students), 3000acres (community gardens and urban agriculture), STREAT (hospitality/chef training for at risk youth), the Stephanie Alexander Kitchen Gardens Foundation (cooking & growing literacy for school aged youth) and Nutrition Australia or the Heart Foundation (health and well-being and active lifestyles).
5. Market tours & farm visits are platforms that can offer value to the customers interaction with the local food system and can be tailored to a variety of experiences such as tourism, health and well-being, farming and gastronomy.

<sup>38</sup> The Food Trust, 'What We Do: Nutrition Education', The Food Trust [website], 2018, <<http://thefoodtrust.org/what-we-do/schools/nutrition-education>>, accessed 15 January 2018.

<sup>39</sup> Grow NYC, 'Empowering Youth', Grow NYC [website], 2018, <<https://www.grownyc.org/youthmarket/empoweringyouth>>, accessed 15 January 2018.

<sup>40</sup> Grow NYC, 'Education & Tours', Grow NYC [website], 2018, <<https://www.grownyc.org/education>>, accessed 15 January 2018.

This is not yet common practice in Australia but could provide substantial additional revenue streams for FM operators and farmers. It has also been highlighted to increase overall market spending through information and education on how to shop at a FM<sup>41</sup>. Utilising existing companies such as Airbnb with their 'experiences' platform could be an entry point opportunity to pilot this initiative.

### iii. Food Access, Social Equity & Community Resilience

In understanding and discussing the layered complexities that surround the social and cultural barriers to FMs, the Fellow wishes to acknowledge her status of privilege as a young, white, educated woman. A meeting with Rosalie Fanshel, Program Manager at Berkeley Food Institute (BFI) provided the Fellow with a greater understanding and perspective of underlying social issues that are at play within the alternative food movement and FM sector.

The barriers existing in the US FM and alternative food movement that continue 'embodying privilege and status and creating even more divisions and polarities within the food system'<sup>42</sup> has influenced the Fellow's thought on the Australian context of FMs with parallels drawn.

The longstanding real or perceived notion that FMs in Australia are over-priced or too expensive continues to hinder the sector, but there is limited research in the Australian context that delves further than the price barrier in identifying other social and cultural barriers. Not only does it demonstrate a broken food system, with consumers not knowing or understanding the true cost of producing 'good food'<sup>43</sup>, but it continues to perpetuate the elitism of FM participation. One study identified lack of understanding between people of low socioeconomic status

(SES) and representations of community-based food systems which was also perpetuating diverging ideas and assumptions on the barriers to participation in farmers' markets and CSAs<sup>44</sup>. The potential perception that people who cannot afford to shop at an accredited FM don't belong there or that they would not be welcome is thereby further alienating. This can also be evidenced by the location of many FMs being in, or close to, affluent neighbourhoods<sup>45</sup>.

#### Learnings:

The adverse impacts of the industrialisation of the food system are concurrent in Australia and the US. It is not so much the issue of access to food, but society's access to fresh, nutritious food.

In contrast to the farm security focus of most FM organisations in Australia and the US, the primary mission of FM program at The Food Trust (TFT) in Philadelphia is to ensure people have access to affordable, nutritious food, particularly given the prevalence of food deserts in the urban setting of Philadelphia. As observed by the Fellow at some TFT's FMs, farmers are permitted to source supplementary produce from the wholesale market or farming neighbours to provide the market communities with a diverse range of fresh produce including culturally appropriate food. This practice was initially a challenging concept for the Fellow however the process of supplementation was transparent and given the extent of food deserts and insecurity in some neighbourhoods, it was necessary.

#### Supplemental Nutrition Assistance Program (SNAP):

The Federal nutrition assistance program, SNAP, budgeted under the Farm Bill and administered through the USDA, demonstrates the complex and deeply entwined relationship that exists between the agriculture and health industries. At the time of the Fellowship travels, there was deep concern amongst FM operators about the proposed cuts to the Farm Bill's food assistance programs. Not only would this severely limit the accessibility of FMs, but it would also hinder the revenue

41 K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 22.

42 S.C. Loewen, 'White Food, Black Spaces: Food, Privilege, And Gentrification In Crown Heights, Brooklyn', Senior Capstone Projects [online journal], no. 243, April 2013, <[http://digitalwindow.vassar.edu/senior\\_capstone/243](http://digitalwindow.vassar.edu/senior_capstone/243)>, accessed 20 January 2018.

43 Ibid. p. 4.

44 K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 24

45 Ibid. p. 26.

viability of farmers attending FMs. For example, in 2016, GMkt alone had over \$US 1 million SNAP benefits traded through the market day economy<sup>46</sup>.

The administration and processes of food assistance programs in each FM organisation varied pending the scale and size of each individual FM system but all had the same outcome and objective of increasing access to fresh, healthy produce and food. In addition to the nationwide SNAP program, across the three States visited, were affiliated programs that increase the purchasing power of people using SNAP benefits in FMs by matching their benefits 1:1, usually up to the value of \$US10. The programs observed were: Market Match (California wide), Philly Food Bucks (Philadelphia) and Health Bucks (New York City). These programs were funded by multiple sectors including government, philanthropic and corporate.

Technology has been a significant enabler of FMs as more equitable spaces via devices accessible to both Electronic Benefit Transfer (EBT) cards and direct debit/credit cards. Rather than the FM operators handing out cash for either card transactions, coupons are instead received which can then be spent across most producers within the marketplace. Restrictions on the certain items that can be purchased with the EBT coupons (i.e. no alcohol) exist, however overall the combined coupon system has reduced the underlying stigma that has been so often associated with food assistance programs.



*Example of SNAP coupons*

### Considerations:

1. To consider what processes can lead to outcomes of improved accessibility of FMs in Australia must involve community-led co-design principles that Australian Government is accountable to delivering<sup>47</sup>. The lack of understanding between low SES and FM operators that has been identified previously, supports the notion for community participatory methodology to implement inclusive and effective strategies<sup>48</sup>. The Community Grocer is an example in Melbourne of a produce market providing culturally appropriate, affordable produce that has been tailored based on their target audience's wants and needs. Whilst the SNAP program's implementation in the FM sector is a systems solution that begins to address accessibility issues to good food, it is not necessarily a solution that is transferrable and applicable to the Australian context. However certain processes may, and this should be investigated further through pilots.
2. The Government has a key role in addressing food security and therefore initiatives to improve the accessibility of farmers' markets. Income management or welfare quarantining has been trialled in areas across Australia since 2007 and currently includes 25,000 participants<sup>49</sup>. A study from 2013 deemed the positive impacts inconclusive with views of it a 'paternalist and stigmatising'<sup>50</sup> however it did not appear to make individual's circumstances worse off<sup>51</sup>. Based on the success of SNAP programs in the US FMs visited, further investigation and piloting of programs to increase the purchasing power at FMs for people on income management, within the context of individual communities, could be possible. For example, City of Greater Shepparton is one of the pilot

<sup>47</sup> Outer Suburban/Interface Services and Development Committee, op.cit., p. 36.

<sup>48</sup> K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 26.

<sup>49</sup> Department Of Social Services, Australian Government, 'Income Management', Department of Social Services, Australian Government [website], 2017, <<https://www.dss.gov.au/our-responsibilities/families-and-children/programmes-services/family-finance/income-management>>, accessed 16 May 2018.

<sup>50</sup> D. Buckmaster, 'Does income management work?', [website], <[https://www.apf.gov.au/About\\_Parliament/Parliamentary\\_Departments/Parliamentary\\_Library/pubs/BriefingBook44p/IncomeManagement](https://www.apf.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/BriefingBook44p/IncomeManagement)>, accessed 2 February 2018.

<sup>51</sup> Ibid.

<sup>46</sup> GrowNYC, 'GrowNYC 2016 Annual Report', Grow NYC [website], p. 9., <[https://issuu.com/grownyc/docs/2016\\_grownyc\\_annual\\_report?e=15344747/33202932](https://issuu.com/grownyc/docs/2016_grownyc_annual_report?e=15344747/33202932)>, accessed 20 January 2018.

communities for income management and has two monthly accredited FMs (Mooroopna & Shepparton). The idea of a similar program to the USDA SNAP program has been supported in focus groups of previous studies and state inquiries<sup>52,53</sup>.

3. Government planning and development strategies must include local food systems in the outcomes and actions. With the Melbourne population anticipated to increase to 10 million people by 2051<sup>54</sup>, State Government initiatives such as Plan Melbourne need to recognise the role that local food systems can have in shaping resilient communities. The prevalence of 'food deserts' in Melbourne is at risk of growing, particularly if residents do not have walking or cycling access to food<sup>55</sup>. This resilience does not only apply to the immediate urban community but also across Victoria through the indirect economic returns and stimulus in the regional and rural communities.
4. Strategies implemented by farmers' market operators to engage with the broader community. As population in Australian urban and major regional centres continues to grow, so too does the cultural diversity and divide between SES groups. Consideration needs to be given to ensuring marketing material is inclusive where appropriate, such as the GMkt marketing material available in various languages. Outreach and partnering with organisations that already engage with low SES or culturally diverse groups that may otherwise not be currently engaged with FMs will help with barriers to access of information about when, what will be available, tips on shopping economically in the FM or using unfamiliar produce<sup>56</sup>.

#### iv: Future of Farming

ABS data has indicated that the median age of Australian farmers in 2010-11 is 53 years of age<sup>57</sup>. Having grown up on a dairy farm, the Fellow is also familiar with the many hardships that are experienced on daily basis, whether it be physical exhaustion, financial pressures, weather extremities or industry collapse. Of concern to the Fellow is the 2010-11 ABS statistic that 53% of Australian farmers are their 'own account workers'<sup>58</sup> thereby a lack of succession planning occurring amongst the ageing farmer population will lead to an even more significant reduction in farming enterprises, increased risk to food security and a huge loss of knowledge.

As the amount of corporate-owned, industrialised agricultural sectors grow in Australia, it is becoming increasingly difficult for small scale farming enterprises to survive or enter the marketplace. Without family endowment, existing property, succession opportunities or significant financial resources- the barriers to farming are exhaustive. However, initiatives such as Farmer Incubator & Planit Rural in Victoria and Cultivate Farms are attempting to reduce these barriers.

Farm and land linking programs were frequently referenced during the Fellow's travels in the US along with various organisations or programs that further supported existing and beginning farmers through mentorships, technical business support and assistance to navigate the paperwork and processes that can often be burdensome and less of a priority for farmers.

52 Outer Suburban/Interface Services and Development Committee, op.cit., p. 35

53 K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 22.

54 Department of Environment, Land, Water and Planning, Plan Melbourne 2017-2050 Summary [website], 2017, <[http://www.planmelbourne.vic.gov.au/\\_\\_data/assets/pdf\\_file/0009/377127/Plan\\_Melbourne\\_2017-2050\\_Summary.pdf](http://www.planmelbourne.vic.gov.au/__data/assets/pdf_file/0009/377127/Plan_Melbourne_2017-2050_Summary.pdf)>, accessed 2 February 2018.

55 City of Whittlesea, 'Farmers' Market Feasibility Review', City of Whittlesea, December 2016, p. 8.

56 K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 23.

57 Australian Bureau of Statistics (ABS), 'Labour Force and Other Characteristics of Farmers', ABS [website], 2012, <<http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/1301.0Main+Features3032012>>, accessed 7 March 2018

58 ibid



## Learnings:

### Happy Acre Farm

The Fellow spent a week with Matt and Helena Sylvester at Happy Acre Farm, a 2.5-acre market garden in Sunol, Northern California. The Happy Acre Farm plot forms part of a 20-acre small farming enterprise called the Sunol AgPark, established in 2006 by Sustainable Agriculture Education (SAGE) with the mission to 'provide land for sustainable farming, support to beginning farmers, and educational opportunities for students and members of the community'<sup>59</sup>. At the time of the visit, there were at least eight other active farming enterprises at the AgPark including a flower grower, tomato breeder and restaurant direct market garden. Affordable leasing arrangements, sharing of knowledge, ideas, tools & equipment and a strong supportive network were several immediate outward benefits of being involved with this type of farming arrangement. At the time of the Fellow's visit, Happy Acre Farm operated a seasonal CSA membership program, plus seasonal attendance at two weekly FM's, in Berkeley and Oakland cities.

Happy Acre Farm is now in its fourth year of operation, having initially started as 1-acre with just Helena farming. Matt was working as a market day manager at the Pacific Coast Farmers' Markets Association and now over the past two years, have both been working on the farm full-time. Happy Acre Farm were part of the 2016 alumni that received business mentoring through organisation, Kitchen Table Advisors.

Happy Acre Farm are part of the next generation of farmers that are strategically using marketing and social media platforms to strengthen their brand, story and create alternative revenue streams. They have an extensive social media following of which they have been able to capitalise on their wonderful story (and via how the Fellow stumbled across the Farm) through sponsorship / ambassador opportunities i.e. with clothing companies and harvesting gear. This is undoubtedly an area of growth for small-scale farming / homesteading in the US.



*Happy Acre Farm, Sunol, California*

### FARMroots, GMkt

On two occasions, the Fellow met with Chris Wayne, Director of the GMkt FARMroots program to understand the extent of this initiative that feeds so integrally into the longevity of the organisation.

The programming of FARMroots addresses three critical areas:

#### 1. Beginning Farmers:

The Beginning Farmer Program was established in 2000 and was exclusively focusing on new immigrants- many with farming background or experience but needing skills in the critical components of business development. This program is primarily funded through the USDA Beginning Farmer and Rancher Program (Federal), with the objectives of both organisation and government strongly aligning. GMkt have a collaborative partnership with Hawthorne Valley

<sup>59</sup> Sustainable Agriculture Education (SAGE), 'Sunol Agpark' SAGE [website], 2018 <<http://www.sagecenter.org/work/agricultural-revitalization/sunol-agpark/>>, accessed 15 February 2018

Farm, a not-for-profit diversified farm, in delivering the program in both Upstate and Downstate regions of New York. Since its inception, more than 250 people have completed the program with 42 going on to start their own independent farming enterprise<sup>60</sup>.

Specific elements include:

- » Tailored field days workshops based on level of experience: i.e. equipment and production training
- » Shoulder to shoulder mentoring and linking with other farmers in the Greenmarket sphere
- » Ongoing technical assistance and mentoring support from the FARMroots team

## 2. Technical Assistance:

In 2011, GMkt conducted a survey<sup>61</sup> of all their farmers to understand what technical assistance would be of greatest impact. The findings raised red flags for the GMkt team and their operations as 50% of their farmers were planning to, or forced to retire within the next 15 years, and of those, 43% had no successor planned. What also became apparent, was that most of these farming enterprise structures were not conducive to a farm transfer arrangement.

The findings of this survey informed the elements of the Technical Assistance program which include:

- » Farm Succession and Transfer
- » Financial & Business Planning
- » Legal Assistance
- » Access to Capital
- » Strategic Marketing Enhancements (see below)

The development and implementation of the program has been solely financially supported through one philanthropic foundation. This has enabled invaluable, increased flexibility working with the Foundation and reallocating funds within the program as appropriate, in comparison to the rigidity of government funding and expectations. Annual Reports are required and every three years, an updated proposal is developed to secure further funding. There is significant pressure to keep the concepts innovative and fresh as funding the same project again and again isn't often supported.

## 3. Strategic Marketing Enhancements:

This assistance program has a strong focus on GMkt day activity and again, was a key outcome from the 2011 survey of what farmers wanted and/or needed – how to increase their sales on market day. With this identified need, FARMroots explored funding opportunities and were successful in securing funding through the State government.

FARMroots have developed an objective mechanism to measure customer behaviour on market days which incorporates 40 years of GMkt institutional knowledge and utilising the transferrable customer research & resources conducted by large scale food retailers and grocery stores. Of the 40 producers that have participated in this program, there has been a reported 17.5% increase in sales<sup>62</sup>.

<sup>60</sup> GrowNYC, 'Beginning Farmer Program', GrowNYC [website], 2018, <<https://www.grownyc.org/farmroots/nfd>>, accessed 8 February 2018.

<sup>61</sup> GrowNYC, 'Farmers on the edge: An Assessment of Greenmarket Farmers' Needs, and the Growing Challenges of Keeping Their Farms Viable', GrowNYC, [website] November 2011, pp. 1-51, <[http://www.grownyc.org/files/gmkt/farmers\\_on\\_the\\_edge.pdf](http://www.grownyc.org/files/gmkt/farmers_on_the_edge.pdf)>, accessed 15 January 2018.

<sup>62</sup> C. Wayne & M. Rojas, 'Understanding Customer Behavior at Farmers Markets Strategies for Increasing Sales and Customer Satisfaction', GrowNYC, 2017.



For each producer receiving this marketing service, the Customer Behavioural Analysis tool includes:

- » Market day data collection & analysis
- » Development of marketing strategies based on the market day data analysis
- » A budget allocation for implementation of strategic outcomes i.e. infrastructure (signage or displays) or design and printing (brand or logo development)
- » Re-analysis of market day data once strategies have been implemented & sales reporting from the producers

#### Considerations for the Australian context:

1. Further research is required to understand the pressure points of farmers participating in the farmers' market sector particularly given the ageing population of farmers' and increased corporate farming enterprises. If these are not identified or known, the viability and longevity of the FM sector is extremely vulnerable.
2. Facilitation of strategic partnerships with organisations such as Cultivate Farm, Farmer Incubator, Education Institutions & government departments that connect, train and educate younger generations with an interest in farming, agriculture and the local food system. Outcomes of such partnerships can include identifying and linking unused land or farmers with land available to co-farm or lease with beginning farmers or organisations<sup>63</sup> and specific, tailored initiatives that will build further support for these activities. The GMkt FARMroots program is an extremely successful model that the Fellow views as being applicable to the Victorian context. Recent findings from the 2016 Whittlesea Farmers' Market feasibility review indicate program alignments with consideration to Whittlesea's Green Wedge Management Plan and the 'potential for expanding small scale production...with 61% of the land area classified as Green Wedge' and promotion of a local agribusiness marketing

program<sup>64</sup>.

3. Structuring the farmers' market sector to address key food systems issues in Victoria. For example, FoodPrint Melbourne research<sup>65</sup> has identified key implications in the Victorian food system such as loss of peri-urban farmland and farmers that programs within the FM sector could start to problem solve and address from a bottom-up systems approach. There is potential for the FM sector to develop innovative programs and key strategic partnerships to tackle these issues and strengthen the opportunities for small to medium scale farming businesses. Technology and social media will be significant tools in aiding this.

## 4. Emerging Opportunities:

There are significant opportunities for the FM and local food sector in Australia. FMs will continue to set the foundations of a resilient localised food system and aid increased opportunities for aligned programs and initiatives. By working in partnership and collaboratively, rather than the predominant siloed approach that exists, a far broader and significant impact will be possible.

### i. Research:

There is currently insufficient research into the FM industry in Australia. Whilst there are a handful of articles available, they are contextually narrow in focus and therefore lacking in solutions or alternatives for the broader sector.

Given the critical Victorian food system issues outlined in the recent FoodPrint Melbourne research, additional research is needed to understand how the FM sector can 1) provide meaningful entry points into the market for new farmers and 2) partner with other organisations to tackle future challenges.

<sup>64</sup> City of Whittlesea, 'Farmers' Market Feasibility Review', City of Whittlesea, December 2016, p.7-8.

<sup>65</sup> Sheridan, J., Carey, R. and Candy, S., 'Melbourne's Foodprint: What does it take to feed a city?', Victorian Eco-Innovation Lab, The University of Melbourne, FoodPrint Melbourne, VEIL, 2016.

<sup>63</sup> Outer Suburban/Interface Services and Development Committee, op.cit., p. 53.

Several US FM organisations had ongoing, established partnerships with educational institutions. For example, Chris Wayne explained in a meeting with the Fellow that GMkt engage with the College of Agriculture and Life Sciences at Cornell University to do surveying of the markets such as the recent study researching the economic impact of metropolitan farmers' markets for regional producers and townships. Collection and analysis of data from the farmers' market sector by external institutions, along with realistic methods for ongoing tracking and data collection would be a powerful tool for measuring the impact of the sector.

## ii. Role of Government:

As demonstrated throughout the learnings and considerations, there is a strong need and opportunity for all tiers of government (local, state, federal) to increase involvement and support in the FM sector.

Encouragingly however, in May 2017, the Victorian Department of Economic Development, Jobs, Transport and Resources (DEDJTR) engaged an external consulting firm to undertake the Victorian Farmers' Markets: Economic contribution and future opportunities project, of which the Fellow participated in the stakeholder workshop and a follow up meeting. This project sought to understand the current scale and nature of farmers' markets across Victoria including the level of economic activity occurring and emerging opportunities for the sector. The findings of this Report are still yet to be released publicly by the Department but will provide the Victorian sector the most recent data and opportunities. The Fellow would like to note that the social and intrinsic value of FMs are still yet to be comprehensively measured or evaluated and that more research is needed. Given this is such a strong outcome of community FMs, it highlights that the complete value of the FM sector is still yet to be fully quantified.

Areas of priority include:

- » Legislation around the definition and what constitutes a 'farmers' markets'
- » Accessibility of FMs to low SES and disadvantages groups, particularly because

all councils in Australia are mandated to have Community Health and Wellbeing plans under the Health Act.

- » Support and funding for programs that foster new agribusiness enterprises focusing on the domestic market
- » Further research and funding opportunities into the economic and social impact of the FM sector and associated areas such as marketing of small farming enterprises, how technology can be utilised to increase the amount of economic activity and scaling up of small to medium sized farming enterprises.
- » Planning of cities and urban growth corridors to support local food systems, initiatives, farmland and individual producers and provide security with permanent agricultural boundaries. There is currently no security or reliability for such support within the existing planning framework due to the political capture. Initiatives such as Marin Agricultural Land Trust in California and the Agricultural Land Reserve in Vancouver are examples of permanent agricultural boundaries. This type of initiative offers potential for the FM sector to work with government to understand the role it can play in creating viable local markets for peri-urban farmers.

## iii. Food Hubs:

While FMs in themselves, will not change the world, they offer the potential for significant food system transformation when they are combined with other existing or innovative programs and models. This notion was instilled during discussions with Liz Carollo, Assistant Director at GMkt with regards to the GrowNYC development of the Greenmarket Co., New York City's first food hub that is 'creating business opportunities for local farmers in the wholesale marketplace'<sup>66</sup>.

There has been much discussion in recent years, with varying interpretations of what a 'Food Hub' is or should be. The Fellow considers a FM to be a Food Hub in a literal and simplistic sense- an intentional meeting place where economic activity

<sup>66</sup> Greenmarket Co., 'Mission Driven Food, Fresh from GrowNYC.', Greenmarket Co. [website], 2018, <<http://www.greenmarketco.org/#mission>>, accessed 7 March 2018.

occurs between producers and the consumers. Nick Rose's 2017 paper builds on this with 'the purpose of food hubs as being to connect smaller farmers with bigger markets to which they otherwise would not have access'<sup>67</sup> and opportunities for aggregation, wholesaling, processing and distribution of food alongside activities that engage a social or community purpose.

FMs deliver and facilitate many more outcomes and successes within and outside of the market day activities such as producer capacity and volume building, networking, procurement and social connectedness. However, the Fellow is realistic about the certain parameters of FMs in terms of amount of activity that can occur around a market day.



*Greensgrow Food Stand, Philadelphia, Pennsylvania*

<sup>67</sup> N. Rose, 'Community food hubs: an economic and social justice model for regional Australia?', Rural Society, DOI: 10.1080/10371656.2017.1364482, 11 August 2017, p. 3

Building additional Food Hub activities around a weekly FMs as an integral, key component to the Hub is a prospective model soon to be implemented through the Alphington Community Food Hub Project. In December 2017, this initiative, a partnership between Sustain: The Australia Food Network and MFM was awarded a prestigious Innovation Grant from the Lord Mayor's Charitable Foundation. This is the first of its kind in Australia given its multi-stakeholder, multi-functional nature. One of the key objectives in undertaking this project is to create a replicable model that can be applied within the context of the community, of which the Fellow sees its viability at this time, limited to an urban setting, with critical population mass.

The Fellow met with Ryan Kuck, Executive Director at Greensgrow, a food hub in suburban Philadelphia which had similar site characteristics to the Alphington site. Greensgrow has a range of programs and projects including:

- » Urban Agriculture
- » Nursery
- » Farm Stand
- » Aggregated Food Box of approximately 700 members plus 100 members signed up to a subsidised box
- » Mobile Markets
- » Community Kitchen (offsite)
- » Events

Education was flagged as a key component that Greensgrow would ideally look to build into their programming.

Consideration must be given to the equitable distribution of food, ensuring that regional and rural communities are not without, particularly if their local producers are prioritising attendance at metropolitan FMs and marketplaces. Often the Fellow hears of small regional accredited FMs that have limited or no vegetable or meat

producers due to their surrounding producers venturing to the more profitable markets in metropolitan areas. This occurrence was also reiterated in 2014 Rural Industries Research and Development Corporation paper, Understanding the Characteristics of Australia Farmers' Markets, with comments from various producers<sup>68</sup>.

#### iv. Procurement:

The Fellow noted strong impetus by several US FM organisations to develop and support mechanisms within the marketplaces that encourage produce procurement from the hospitality industry.

Initiatives included:

- » Designated parking & permits close to the market for chefs, wholesalers and specialty to collect pre-orders
- » Chef Carts
- » E-newsletters specifically tailored to the hospitality industry
- » Chef celebrities and the like, being 'market champions'

There is huge potential for local produce procurement in Melbourne for the establishment of a weekday FM that is tailored for chefs, cafes, restaurants, catering companies and produce buyers.

A central hub for chefs to collect their weekly produce orders directly from the farmer would potentially reduce the amount of food miles through fewer deliveries by the farmer, reduce the stress and logistically complexities that can often prove to be barriers to directly supplying the food businesses.

#### v. Membership Models:

The Fellow identifies market membership models as an adaptable tool to leverage greater accountability from consumers, encourage increased number or size of purchases and form targeted outreach campaigns and collaborations to appeal to various groups of people<sup>69,70</sup>.

Market membership models don't have to be considered for market economies of scale (i.e. MFM operating multiple markets) and can be applied for standalone markets. Adelaide FM is an example of a market with a yearly membership program that also offers a concession membership and features market specials, newsletters, prizes, voting rights and more<sup>71</sup>.

The Fellow anticipates growth in CSAs amongst farmer driven membership programs across Australia. It was apparent that juggling the systems of CSAs with attendance at FMs can often lead to unsustainable workloads for already stretched farmers – this is likely to stem the take-up of CSA models. However, the Fellow sees much merit in producer's value-adding their time and travels to urban regions where possible and reaching another group of customers. Utilise existing software platforms such as Open Food Network to set up online shops, immediately and affordably can be a straightforward method of testing the viability of a CSA.

69 K. Markow, S. Booth, S. Savio & J. Coveney, op.cit., p. 22

70 Outer Suburban/Interface Services and Development Committee, op.cit., pp. 32-33

71 Adelaide Showground Farmers' Market, 'About Membership', Adelaide Farmers' Market [website], 2018, <<http://www.adelaidefarmersmarket.com.au/www/content/default.aspx?cid=750&fid=752>>, accessed 11 February 2018

68 Rural Industries Research and Development Corporation / V. Woodburn, Understanding the characteristics of Australian farmers' markets, [website] 6 June 2014, p. 32, <<http://www.agrifutures.com.au/publications/understanding-the-characteristics-of-australian-farmers-markets/>>, accessed 11 February 2018



## 3. Personal, Professional and Sectoral Impact

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### Personal:

- » Only Australian known at this point to have conducted this extent of immersion with international FM. organisations, therefore insights valuable to broader Australian farmers' market community.
- » Shaping of the Fellow's own beliefs and thoughts.
- » Further development of inter-personal and communication skills.
- » Research / report writing skills, particularly timely with the commencement of a Master of Food Systems and Gastronomy in 2018.
- » Opportunity to build on the solid foundations of the Fellowship and MFM experience to identify new research questions that the Fellow is ideally positioned to address within individual subjects and the Minor Thesis the Master of Food Systems and Gastronomy.
- » Further affirmation of place in this sector and commitment to contributing in a positive way.

### Professional:

- » Creating networks & associates with valuable experience in the field.
- » Research and writing skills, to be utilising with grant writing and proposal development.
- » Critical/analytical thinking development.

### Sectoral:

- » Identifying opportunities for the FM and local food sector.
- » Representing the broader FM industry of Australia.
- » Approach & affiliated Food Hub contacts with regards to embarking on the Alphington Community Food Hub project in 2018.
- » Connecting with local food organisations to share learnings – not limited to only the FM sector through various platforms i.e. public talks, guest lectures, case studies, stories, partnerships with organisations within the sector to develop a collective action approach to key issues and more.



## 4. Conclusion

The Australian farmers' market sector is in a dynamic position to respond to the ever-changing food system and create a more resilient domestic marketplace.

Continuing to develop systems and processes that ensure farmers' markets stay relevant in a world of growing convenience and accessibility to food will be an important focus point for the Australian farmers' market sector. The ability to implement change may be more possible in the comparatively young Australian FM sector compared with the longer established and more complex system in the US.

The values of integrity, accountability and transparency within the farmers' markets sector that are strengthened through initiatives such as the Victorian Farmers' Markets Association Accreditation Program will only become more relevant and important to both producers and customers as the effects of the industrial globalised food system continue.

Farmers' market organisations and operators need to work closely with farmers and producers as they too respond to the changing nature of farming, particularly in relation to technology. Tools and programs that enable efficiency of administrative systems whilst continuing to strengthen the relationship management processes between farmers' market organiser and producers will be key to the viability and success of farmers' markets.

Observations and learnings from the US farmers' market sector have highlighted emerging opportunities for the Australian sector. Of critical importance to the Australian context is knowledge, available data and research gaps. For instance, although there is anecdotal evidence within the FM sector to suggest that FMs act as an important incubator for small food and agricultural businesses, the specific support systems that farmers find valuable and their pathways to achieving economic viability are poorly understood.

Access to healthy, nutritious food and the future of farming are key components of food security at a national and local level. Further research is required to understand how farmers' markets can develop programs to address these compounding issues.

In concluding this Fellowship, the learnings from the US farmers' market organisations have made it clear that the future of farming, market integrity, programming that includes education and improved accessibility are key areas of priority for the Australian and Victorian farmers' market sector. Further research will be critical to seeing these emerging opportunities come to fruition.



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- » Preparing a detailed report for distribution to government departments, industry and educational institutions
- » Recommending improvements to accredited educational courses
- » Delivering training activities including workshops, conferences and forums.

The organisation plays a pivotal role in creating value and opportunity, encouraging new thinking and early adoption of ideas and practice. By working with others, ISS Institute invests in individuals who wish to create an aspirational, skilled and smart Australia through innovation, mastery and knowledge cultivation.

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## Sponsor – The George Alexander Foundation

The Fellow sincerely thanks The George Alexander Foundation for providing funding support for the ISS Institute and for this Fellowship. In 1972, George Alexander AM (1910 - 2008) set up an independent philanthropic Foundation as a way of sharing his wealth and giving back to the community. Today, the main focus of The George Alexander Foundation is access to education for promising young people, particularly students with financial need and those from rural and remote areas.

The George Alexander Foundation (GAF) Scholarship and Fellowship Programs form the core of the foundation's work, operating in partnership with major tertiary institutions, while our Fellowships and other Education grants provide a variety of other unique and challenging educational experiences. George Alexander believed in the notion of 'planting seeds and hoping they grow into pretty big trees'. The programs supported by the Foundation endeavour to support this ideal and as GAF students graduate and go on to contribute to the community, George's legacy and spirit lives on through their achievements. George Alexander came to Australia as a child migrant, and went on to become a mechanic, an entrepreneur and a businessman and later, a generous philanthropist, who held that you do not own the possessions you have, 'you're just minding them'. This philosophy guided him to give during his lifetime and to hope that through his example, he might inspire others to do the same.

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## 7. Appendices

**Appendix 1:** Farmers' markets of the focus organisations that were visited by Fellow

STATE	ORGANISATION & MARKET VISITED	TRADING DAY	MARKET FREQUENCY
California	SMFM Main Street Market	Sunday	weekly
	SMFM Downtown Market	Wednesday, Saturday	bi-weekly
	SMFM Virginia Park	Saturday	weekly
	CUESA Ferry Plaza FM	Tuesday, Thursday, Saturday	tri-weekly
	CUESA Jack London Square FM	Sunday	weekly
	Ecology Centre Downtown Berkeley Market	Saturday	weekly
	Ecology Centre North Berkeley FM (100% organic)	Thursday	weekly
	AIM Grand Lake FM	Saturday	weekly
	AIM Civic Centre FM	Thursday, Sunday	bi-weekly
Philadelphia	The Food Trust 58th & Chester St FM	Wednesday	weekly (seasonal)
	The Food Trust Fitler Square FM	Saturday	weekly
	The Food Trust Clark Park FM	Thursdays, Saturdays	bi-weekly
	Farm to City Rittenhouse FM	Saturday	weekly

New York City	Greenmarket Union Square	Monday, Wednesday, Friday, Saturday	4 per week
	Greenmarket Rockefeller Centre	Wednesday, Thursday, Friday	weekly (seasonal)
	Greenmarket Tucker Square	Thursday, Saturday	weekly
	Greenmarket Jackson Heights	Sunday	weekly
	Greenmarket Brooklyn Borough Hall	Tuesday, Thursday, Saturday	weekly
	Greenmarket Oculus Plaza	Tuesday	weekly (seasonal)
	Greenmarket McCarren Park	Saturday	weekly
	Greenmarket Columbia University	Thursday, Sunday	weekly
	Greenmarket Grand Army Plaza	Saturday	weekly
	Greenmarket Parkside Plaza	Sunday	weekly (seasonal)
	Greenmarket Poe Park	Tuesday	weekly (seasonal)

**Appendix 2:** Santa Monica Farmers' Market Load Sheet Template (see page 46)

**Certified Producer Name**

Date \_\_\_\_\_

Completed by (print name)

Telephone #

## Certified Farmers Market Load Sheet



**Signed.** I hereby declare that this produce is brought to this market in full accord with the Direct Marketing Regulations of the California Department of Food and Agriculture, the rules of the Santa Monica Farmers Markets, and other pertinent regulations.

MARKET ATTENDED (circle one)				PROCESSED FOODS		Units In	Units Sold	VEGETABLES		Units In	Units Sold
Wed	Sat (Dtn)	Sat (VAP)	Sunday	dates / dried fruits				artichokes			
ANIMAL PRODUCTS		Units In	Units Sold	grains / rice				Asian veg			
Beef / Bison				honey				asparagus			
cheese				jams / preserves				beans (all)			
dairy				juice				beets / turnips			
eggs				nuts (specify)				broccoli			
fish (attach ticket)				olives/olive oil				carrots			
Pork / Lamb				breads				cauliflower			
poultry				spreads				celery			
shellfish				Section Total Sales		\$		cucumber			
Section Total Sales		\$		STONE FRUITS		Units In	Units Sold	eggplant			
CITRUS & AVOCADO		Units In	Units Sold	apricots				peas (all)			
avocado				cherries				peppers (all)			
grapefruit				nectarines				radish			
lemons/limes				peaches				squash (all)			
oranges				plums				Other			
tangerines				Section Total Sales		\$		Section Total Sales		\$	
other (list)				GRAPES		Units In	Units Sold	GRAND TOTAL SALES AND FEES			
Section Total Sales		\$		black grapes				Total Sales All Items \$			
FRUITS		Units In	Units Sold	green grapes				SMCFM (4.5%) \$			
apples / cherimoya				red grapes				+ Legislative Fee \$ 2.00			
black/boysenberries				Section Total Sales		\$		CREDITS			
blueberries				TOMATOES		Units In	Units Sold	(subject to verification) Amount \$ Staff Initial received			
raspberries				cherry tomatoes				Food Stamps \$			
Asian pears				tomatoes				Market Match \$			
kiwi / figs				Section Total Sales		\$		Market Dollars \$			
melons				HERBS & GREENS		Units In	Units Sold	WIC \$			
persimmons				cabbage				- Total Credits \$			
pomegranates				chard				= Total Due \$			
Section Total Sales		\$		greens				Payment Received \$ #			
ONIONS, GARLIC, POTATOES & MUSHROOMS				herbs				WHOLESALE / RESTAURANT SALES			
	Units In	Units Sold		lettuce				\$			
garlic				salad mix				Please make checks payable to			
mushrooms				spinach				CITY OF SANTA MONICA			
onions				sprouts				NO CASH PAYMENTS ACCEPTED			
potatoes				Section Total Sales		\$					
yams/swt potatoes				FLOWERS & PLANTS		Attach List					
other (list)				cut flowers							
Section Total Sales	\$			potted plants							
STRAWBERRIES	Units In	Units Sold		trees / firewood							
Strawberries				Section Total Sales		\$					
Section Total Sales	\$										

Certified Producer Name EXAMPLE: ABC Farm (as listed on Producers Certificate)

Date PRINT DATE OF THE MARKET

Completed by (print name) NAME OF THE PERSON COMPLETING THIS FORM

Telephone # TELEPHONE NUMBER OF PERSON ABOVE

## Certified Farmers Market Load Sheet



**Signed.** I hereby declare that this produce is brought to this market in full accordance with the Direct Marketing Regulations of the California Department of Food and Agriculture, the rules of the Santa Monica Farmers Markets, and other pertinent regulations.

ANIMAL PRODUCTS	Units In	Units Sold
Beef / Bison		
cheese		
dairy		
eggs	<u>20 DOZ</u>	<u>15 DOZ</u>
fish (attach ticket)		
Pork / Lamb		
poultry		
shellfish		
<b>Section Total Sales</b>	<b>\$75.00</b>	

CITRUS & AVOCADO	Units In	Units Sold
avocado		
grapefruit	<u>200 lbs.</u>	<u>150 lbs.</u>
lemons/limes		
oranges		
tangerines		
other (list)		
<b>Section Total Sales</b>	<b>\$300.00</b>	

### FARMER INSTRUCTIONS

#### REPORTING SALES

Complete the top portion of the load sheet and sign. The load sheet is divided into commodity groups (ie. Animal Products, Citrus & Avocado, etc.). Using the appropriate group:

1. List the amount of product you started with at the beginning of the day.
2. List the amount of each product you sold during the day by unit as listed on your CPC (bunches, lbs. etc.)
3. For each commodity category, list the total amount of sales in \$.
4. If your product is not listed, manually write in the type and variety (ie. mango / papaya)

#### TABULATE TOTALS

1. Tabulate and record the sum of the commodity category totals here.

**optional: tabulate your totals**

- a. Total Sales x .045 + 2.00
- b. Total Credits
- c. Subtract credits from total to calculate the payment due.

#### REPORTING CREDITS

1. Record credits in \$.  
See "Types of Credits Accepted" (above right)

#### REPORTING WHOLESALE / RESTAURANT SALES

1. All farmer sales including sales to restaurants /wholesale customers shall be declared AND are subject to the 4.5% market fee.
2. Report wholesale / restaurant sales w/ table sales in the commodity categories and section totals. Also, list the wholesale / restaurant sales separately **here**. You will not be billed for this section only on the items listed in the commodity categories.

### TYPES OF CREDITS ACCEPTED

#### Food Stamps



#### WIC / Senior FMNP

\$2 & \$4 checks only



#### Market Match



**Market Dollars - NEW!** Replaces Kids Class Coupons, Recipet book slips, and gift certificates.



### GRAND TOTAL SALES AND FEES

Total Sales All Items **\$375.00**

SMCFM (4.5%) **\$16.88**

+ Legislative Fee **\$2.00**

**Total Due \$18.88**

#### CREDITS

(subject to verification)

Staff Initial  
Amount \$ received

Food Stamps **\$3.00**

Market Match **\$20.00**

Market Dollars **\$**

WIC **\$**

- Total Credits **\$23.00**

= Payment Due **-\$4.13**

Payment Received \$ #

### WHOLESALE / RESTAURANT SALES

\$

Please make checks payable to  
**CITY OF SANTA MONICA**  
**NO CASH PAYMENTS ACCEPTED**

### PREPARED FOOD, FEATURED RESTAURANTS AND RETAIL VENDOR INSTRUCTIONS

#### REPORTING SALES

Complete the contact information portion (at the top of the load sheet) and sign. The load sheet is divided into commodity groups (ie. Animal Products, Citrus & Avocado, etc.) which apply only to farmers.

1. Simply report your gross sales in the **GRAND TOTAL SALES AND FEES** under **Total Sales All Items** on the right hand side of the form.

#### REPORTING CREDITS

Prepared Food and Retail vendors are not eligible to accept Food Stamps, Market Match or WIC. You may accept Market Dollars and receive credit off your bill.



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