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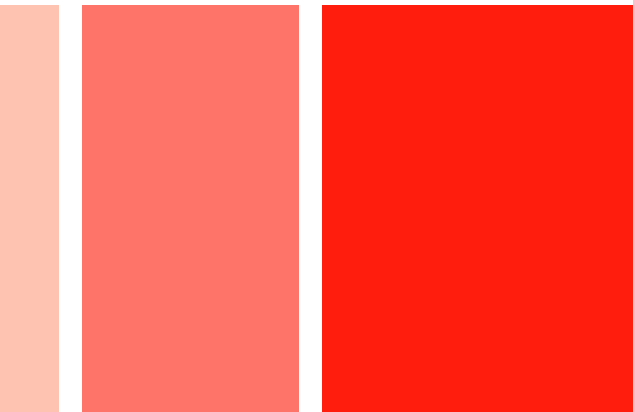
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Evaluation of the Community Food Co-operative Programme in Wales



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BMG Research
June 2012

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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Executive Summary

In March 2010 BMG Research was commissioned by the Welsh Government to undertake an evaluation of the Community Food Co-operative Programme in Wales. The Community Food Co-operative Programme aims to increase access to, and consumption of, fresh fruit and vegetables among people in Wales and to support local producers in rural and urban Wales. The programme is supported by the Rural Regeneration Unit and funded by the Welsh Government, and is currently delivered via almost 300 fruit and vegetable bag schemes which are run by volunteers.

Using a range of qualitative and quantitative approaches, the evaluation examined take-up and consumption, the effectiveness of the delivery model and the impact of the programme on participants, volunteers, suppliers and the wider community.

The evaluation approach

The research adopted a mixed-method approach, combining both qualitative and quantitative methodologies to capture evidence from a range of different stakeholders (managers, development workers, volunteers and customers) alongside a review of monitoring data. The approach included:

- desk based review of programme documentation and initial evaluation;
- qualitative discussions with the RRU Manager and Welsh Produce Manager;
- qualitative discussions with six Food Development Workers (FDWs);
- qualitative telephone interviews with 39 suppliers;
- a telephone survey of 156 Food Co-op volunteers;
- a postal self-completion survey of 266 food customers representing 39 food co-ops, and
- a review of monitoring data on bag sales and customers.

The Community Food Co-operative Programme

The Community Food Co-operative programme began in 2004 as a small pilot in two areas in Wales. At the time the data was collected (Spring 2011) there were 276 food co-ops across Wales (115 of which are in Communities First areas, with 42% of all food co-ops being in Communities First areas), and the programme was on target to reach 315 by March 2011.

The community food co-ops are run from a range of community and schools venues by a team of volunteers, with support from the Rural Regeneration Unit's General Manager, Welsh Produce Manager and six regional Food Development Workers. The programme has an annual running cost of £500,000.

Community food co-ops supply bagged vegetables, fruit and salad for a fixed price, which customers order and pay for a week in advance. Some community food co-ops also provide additional produce such as eggs, meat and fish, depending on demand. The programme has 75 direct suppliers, which includes growers, wholesalers and local shops.

On average, 1,429 volunteers across Wales give up their time each week to help to run the community food co-ops. Assuming the co-ops are open on average for 45 weeks each year

and each volunteer gives an average of two and half hours of their time for each of these weeks, this equates to over 160,763 volunteer hours per year.

By March 2011, the community food co-ops had a total average of just over 4,420 customers per week across all 276 community food co-ops, with a range of around 10 customers per week for the smaller ones to over 30 for a few of the larger and more established co-ops.

Based on figures for February to March 2011, the average number of bags being sold in a week is 6,800. At an average cost of £3 per bag this equates to approximately £20,400 of sales per week. Assuming co-ops run for an average of 45 weeks a year this is generating over £918,000 of income to Welsh businesses, meaning that for every £1 spent, approximately £1.84 is being generated.

The Role of the Rural Regeneration Unit

The Rural Regeneration Unit provides a General Manager, a Welsh Produce Manager and six Food Development Workers to support the food co-operatives programme. A significant role is identifying and developing new sites for community food co-ops and establishing and maintaining relationships with volunteers, suppliers and local community groups and organisations. Intensive support from Food Development Workers in the early set-up stages was particularly important.

Notable challenges were encountered in identifying suitable, free, venues for community food co-ops, with volunteers often needing support from Food Development Workers to find appropriate sites and negotiate access.

Beyond the initial face-to-face support, telephone contact was maintained with community food co-ops, with the most common issue to resolve being access to additional bags for customers to take the produce home in. This was often felt to be not the best use of Food Development Workers' time and required an alternative solution. Ensuring the co-op volunteers understood the importance of the cost-neutral operating model for the food-ops was also an ongoing task.

Ad-hoc requests for support tended to be around supplier issues that the volunteers were unable to resolve themselves (for example, ongoing quality problems or a new supplier needed), or around support with promotional/marketing activities.

Food Development Workers would welcome more time to develop and expand new co-ops, particularly schools-based venues and others that had the potential to engage with families with children.

The Food Co-operative Volunteers' Perspective

Community food co-ops rely on volunteers to run them. A telephone survey of 156 'lead' volunteers and qualitative discussions with volunteers during visits to six different community food co-ops qualitative work was undertaken to explore their experiences and views.

Most volunteers are female, aged 40 or over. Just over three fifths are in work and a fifth retired with the remainder not working/caring for dependants. Volunteers tended to have been involved for some time, and planned to continue to do so. In almost all cases, they would recommend being a volunteer to others. Nevertheless, many noted challenges in recruiting and retaining other volunteers and customers, as well as occasionally dealing with supply issues.

The main reasons for becoming involved related to wanting to benefit the community, to encourage healthy eating and to support the local food industry. For schools based co-ops,

helping to support Healthy Schools activities was particularly important, as well as other factors such as Eco schools and supporting the Estyn inspection framework. Volunteers perceived that the community food co-ops have resulted in increases in fruit and vegetable consumption and more local produce bought. Additional (and generally unanticipated) positive outcomes for volunteers included learning something new, meeting new people and gaining new skills (linking in some cases to raised employability). Volunteers also felt that the community food co-ops offered excellent value for money as well as promoting healthy eating and supporting the local community.

The majority of community food co-ops represented did not run alongside other activities, suggesting there is some scope for them to do so, particularly when based in community settings. Where provided, examples of other parallel activities included adult learning, tea/coffee, health activities, credit unions and lunch clubs.

In terms of sustaining community food co-ops, volunteers had worked hard to encourage customer retention through promotional leaflets/posters, giving information on healthy diets and recipes and so forth. Volunteers suggested a need for more support on how to advertise and promote co-ops.

Support from Food Development Workers was viewed very positively, although given the very high levels of satisfaction with the availability and intensity of support there may be an over-reliance in some cases.

The Food Co-operative Customers' Perspective

A short self-completion postal survey was distributed to 39 larger community food co-ops (with 20+ customers a week) in July and August (excluding schools, due to the time of year) and 266 customers returned completed questionnaires (covering 39 schemes, across, all regions). Most co-op customers are female (four fifths) and are either working full time or retired (around two fifths in each case).

Customers identified a range of motivations for using community food co-ops, with supporting local communities and providing access to cheap fresh fruit and vegetables being the main motivations for most customers. The fact that produce is sourced from local businesses and farmers were also important reasons for customers using the community food co-ops.

Most customers (four fifths) said that they eat more healthily since using the co-op and three quarters say that their families also eat more healthily. Buying produce from the community food co-ops has resulted in two thirds of customers cooking more meals for scratch.

Customer loyalty is high - virtually all respondents reported that they would use the co-op again. Poor quality produce was cited as the main reason that could lead to customers removing their custom from co-ops. However, volunteer perceptions about reasons why customers stop using community food co-ops centred on personal reasons such as moving out of the area and poor health rather than anything directly linked to the food co-ops themselves.

The Food Co-operative Suppliers' Perspective

Over 75 suppliers have been involved in the food co-op programme, and 41 of these were interviewed (including two who are no longer part of the programme). The suppliers vary in size from very large organisations with annual turnovers into the millions of pounds to smaller, independent suppliers receiving revenue of around £30K annually. Most suppliers advised that working with co-ops was only a very small element of their trade, typically

through supplying between one and five co-ops. Only a few said that it represented over 10 per cent of their business, supplying 10 or more co-ops. However, a few of these larger suppliers work with over 50 co-ops.

Suppliers found out about the programme from a range of sources including through the Rural Regeneration Unit (including through the outreach work of the Welsh Produce Manager), co-op volunteers contacting suppliers Communities First co-ordinators and word-of-mouth from other suppliers.

The types of produce supplied to co-ops varied depending on the price and availability of produce that was available with suppliers stating that they have aimed to provide best value. All of the suppliers sourced a proportion of their produce from third party suppliers, and around a third of suppliers also produced their own fruit and vegetables. Suppliers reported that the proportion of produce that is sourced from Wales tends to be very low since there is a limited range of produce grown in Wales, particularly fruit.

Suppliers can manage demand from the co-ops, and suggested that more customers would be a distinct advantage.

Overview of outcomes

Almost 4,500 customers are buying bags of fruit, vegetables or salad from community food co-ops each week. Volunteers, customers and their families are eating more fresh fruit and vegetables as a result of the community food co-ops. Local community engagement and social interaction was increased through buying produce from the community food co-ops, and from becoming involved as a volunteer. As well as supporting local activity, volunteers also reported benefits to themselves, including developing their employability skills.

The programme has also enabled community food co-ops to link in with other activities (such as healthy schools, education and social events) and has brought new activities and opportunities to community venues. Communities themselves benefited through increase sales of local produce and the introduction of new suppliers such as meat and fish. Schools-based co-ops in particular were supporting literacy, numeracy and enterprise skills among pupils.

The community food co-ops are generating over £918,000 of business each year, through the sale of 6,800 bags on average each week. Although it was a small area of business for some suppliers, for others it was (or had the potential to become) much larger.

Conclusions and recommendations

In conclusion, the evidence indicates that the community food co-ops have successfully enhanced the provision of fresh fruit and vegetables to communities at a local level, providing good value, low-cost access to quality produce, sourced locally where possible, and the benefits are far in excess of the input in terms of programme running costs. However, the benefits of the community food co-ops extend far beyond increasing access to and consumption of fruit and vegetables to raising the profile and capacity of the community, building social networks and cohesion, and increasing knowledge of healthy food as well as providing new opportunities to develop education and skills. Recommendations for continued success include:

- continuing the key roles of the RRU Manager and the Welsh Produce Manager who liaise between the different stakeholders, support the Food Development Workers and suppliers as well as playing key strategic roles in development and sustainability
- ensuring that the Food Development Worker role is concentrated on initial start-up support and working in the regional areas to identify suitable venues and suppliers, establish networks and assess demand. Whilst hands-on start-up support is crucial in getting new Co-ops off the ground, once established, additional support should, where possible, be provided remotely (for example online or through guidance material) or at arms-length to encourage self-sufficiency
- wider recognition of the benefits of the community food co-ops which extend beyond health and well-being. They have the potential to make a significant contribution to other policy areas such as community cohesion, economy and business, as well as transport, education and the environment
- expanding the diversity of the customer profile to include more families, younger people and working adults. Work needs to be done to develop this, to encourage and facilitate wider access, for example through more schools provision; linking with libraries, leisure centres and existing community-based groups; and differing opening hours (i.e. increasing availability in the evenings and at weekends). Food cooperatives could even be established in the workplace and promoted via targeted programmes such as Change 4 Life
- further recognition of the substantial contribution that volunteers make. This could be emphasised by, for example, rewarding contributions, accrediting training and linking in to other volunteer networks, locally and across the UK
- greater facilitation of volunteer interaction between co-ops to enable the sharing of good practice, advice on commonly experienced problems and to provide general peer support. This could be done through volunteer get-togethers, web forums (such as Twitter, Facebook groups) and more local and regional newsletters
- providing more help to volunteers on promotion and marketing to ensure that their co-ops are sustained, in terms of customers, suppliers and volunteers. There is a clear need to strengthen practical support available (for example, materials) as well as developing and maintaining skills. The promotion of community food co-ops needs to emphasise the benefits beyond better access, healthier living and low cost. They also include, for example, supporting local businesses, promoting ethical trade and reducing food miles. Help could be available through a dedicated volunteer portal via the RRU website as well as via the volunteer handbook (currently under development)
- consideration of a (free) membership scheme to gather more information on its customer base, which may in turn inform future food co-op development
- expansion of produce available - where pilots have provided produce beyond fruit and vegetables to customers, these have proved to be successful – demand is there – and it is recommended that these are continued, and
- some work needs to be done around managing consumer expectations and consideration given to handling and storing some perishables within cooperative venues.

1 Introduction

In March 2010 BMG Research was commissioned by the Welsh Government to undertake an evaluation of the Community Food Co-operative Programme in Wales. The Community Food Co-operative Programme aims to increase access to, and consumption of, fresh fruit and vegetables among people in Wales and to support local producers in rural and urban Wales. The programme is supported by the Rural Regeneration Unit and funded by the Welsh Government, and is currently delivered via almost 300 fruit and vegetable bag schemes which are run by volunteers.

Using a range of qualitative and quantitative approaches, the evaluation examined take-up and consumption, the effectiveness of the delivery model and the impact of the programme on participants, volunteers, suppliers and the wider community.

1.1 Background and context

The World Health Organisation defines health as:

"a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity".

A varied and balanced diet providing sufficient energy and an adequate supply of essential nutrients can enhance health and fitness¹. In contrast, a poor diet can lead to a range of illnesses, including diabetes, cardiovascular disease and some cancers.

It has been estimated that eating at least five portions of a variety of fruit and vegetables a day could reduce the risk of deaths from chronic diseases by up to 20%².

1.1.1 The Wales context

In a report published by the Food Standards Agency in 2003, it was noted that the Welsh Government is committed to improving the health of the population and reducing inequalities by tackling underlying causes of ill-health³. Relatively high levels of chronic disease in Wales, such as coronary heart disease and cancer, plus a life expectancy two or three years below the best in Europe have prompted closer attention to diet as one of the underpinning causes of ill-health. The Welsh Health Survey 2008 reported that only 35% of adults had eaten five or more portions of fruit or vegetables on the previous day⁴, suggesting that around two thirds of people in Wales are not consuming the recommended daily amounts of fruit and vegetables.

Further to this, according to the Welsh Government's Food and Well Being paper¹, health in Wales compares poorly with that in many other European countries and is consistently worse than in England. There are also substantial inequalities in health between different communities in Wales, with death rates being highest in those areas experiencing the highest levels of social and economic deprivation.

¹ National Public Health Service for Wales, 2009

² Department of Health (2000). The NHS Plan. London: Department of Health

³ Food Standards Agency Wales - *Reducing inequalities through a nutrition strategy for Wales, 2003*

⁴ The Welsh Health Survey 2008, Welsh Assembly Government

In response to these pressures, the Community Food Co-operative Programme in Wales was designed to increase the intake of fruit and vegetables across Wales, by providing easily accessible fruit and vegetables at wholesale prices. The Community Food Co-operative Programme supports recommendation two of the set of recommendations highlighted by the Minister for Health and Social Services in 2003. Recommendation two refers to increasing fruit and vegetable intake among the general population, especially among the identified priority groups. Priority groups are defined as children and young people, low income groups, the elderly and minority ethnic groups. The Community Food Co-operative Programme began, as a pilot, in 2004, with funding from the Welsh Government (Inequalities in Health fund) to provide grant funding to the Rural Regeneration Unit to develop and support the programme.

The programme supports the delivery of a number of key Welsh Government strategies, including:

- One Wales – the Welsh Government’s progressive agenda for improving the quality of life of people in all of Wales’s communities, especially the most vulnerable and disadvantaged - includes a healthy futures theme
- Our Healthy Future (public health strategy), which aims to tackle the biggest causes of preventable ill-health (which includes poor diet) and its financial burden on the health service and on the wider economy and society. In particular; the priority actions include the reduction of health inequalities and tackling unhealthy eating (which is a key focus of the new Change4Life campaign);
- Strategic Action Plan for the Welsh Horticulture Industry (Welsh Government, April 2010) which provides the vision for a sustainable industry that benefits the people and environment of Wales (and identifies the Community Food Co-operative Programme as one of the initiatives that is ‘leading the way’ in best practice in Wales);
- Food for Wales, Food From Wales 2010:2020 – A Food Strategy for Wales (Welsh Government, 2010) which sets out a wide ranging vision of the place of food in Wales, outlining a clear direction for the Welsh food industry to grow in a sustainable and profitable manner over the next 10 years. The key basic principles within this strategy are sustainability, resilience, competitiveness and profitability. In particular the strategy emphasises the need to make sure that everyone has access to the food they need and the importance to the environment of looking at ways of reducing food miles, sourcing food locally and eating seasonally. The Strategy encourages the creation of new public spaces for producers and consumers around a sustainable food culture, which includes food co-operatives.
- Local Sourcing Action Plan, which encourages local food producers to develop the provision of produce to meet the health agenda (the plan supports the development of local community food projects and cites the community food co-ops as a way of delivering this by providing access to fresh and nutritious food);
- Food and Fitness 5-year Implementation Plan which sets out some of the ways in which the Government is helping children and young people to eat well, stay fit and achieve the highest standard of health possible. This includes improving access to healthy foods in schools.

1.1.2 Earlier evaluation evidence

The pilot scheme (2004-2006) was evaluated by the Cardiff Institute of Society, Health and Ethics (CISHE), School of Social Sciences, Cardiff University. This study advised that it appeared that most people buying from community food co-ops were eating more fruit and vegetables. Additionally, changes in attitudes to fruit and vegetables were reported for other beneficiary groups associated with the co-ops that is; families, schools and the community as a whole. Other wide ranging impacts were identified too including positive changes to the quality of social lives and connections to other people, and perceived improvements to health and understanding of health related issues. This evaluation builds on these findings through a wider evaluation of the national scheme.

2 Research Aim, Objectives and Methodology

2.1 Research Aim and Objectives

The overall research aim was to build on the evidence gathered from the initial evaluation of the Wales community food co-operative programme, focusing specifically on:

- Fruit and vegetable consumption
- Support mechanisms for the co-ops
- Supply source and
- Customer and volunteer profiles.

Thus, the research objectives were:

- to explore the extent to which there is evidence in change in the consumption of fruit among customers
- to assess how the role of Food Development Workers has developed over time and their role in the programme in setting up new community food co-ops and supporting existing ones, in particular:
 - how effective is the role of the Food Development Workers as a mechanism for implementing the programme? and
 - to what extent is the current level of support from the Food Development Workers sufficient to sustain successful community food co-ops in future?
- to examine the (current and likely future) impact of the programme on Welsh businesses supplying the food co-op, in particular:
 - Is the programme increasing local, Welsh and/or British supply to the community food co-ops?
 - Have customers' and volunteers attitudes towards local, regional or Welsh produce changed as a result of using community food co-ops?
 - What do customers and volunteers define as local?
- to identify profiles of current customers and volunteers, and ex-customers of the community food co-ops, in particular:
 - What are the benefits of joining community food co-ops?
 - What are the major factors for customers and volunteers staying with the co-ops?
 - What are the major factors for customers to stop using the community food co-ops? and
 - What are the socio-economic characteristics of customers?

2.2 Research Method

The research adopted a mixed-method approach, combining both qualitative and quantitative methodologies to capture evidence from a range of different stakeholders (managers, development workers, volunteers and customers) alongside a review of monitoring data. The approach included:

- desk based review of programme documentation and initial evaluation
- qualitative discussions with the RRU Manager and Welsh Produce Manager

- qualitative discussions with six Food Development Workers (FDWs)
- qualitative telephone interviews with 39 suppliers
- a telephone survey of 156 community food co-op volunteers
- a postal self-completion survey of 266 food customers representing 39 community food co-ops and
- a review of monitoring data on bag sales and customers.

2.3 Report structure

This report details findings from Stage 1 of the evaluation as follows:

- Chapter 3 provides an overview of the Community Food Co-operative Programme, detailing its operational activities
- Chapter 4 describes the role and operation of the Rural Regeneration Unit, which supports the Community Food Co-operative Programme
- Findings from the telephone survey with community food co-operative volunteers are detailed in Chapter 5
- The experiences and motivations of community food co-op customers are examined in Chapter 6
- Chapter 7 explores the views and activities of suppliers
- An assessment of the outcomes and impact of the programme is detailed in Chapter 8 and,
- Chapter 9 provides conclusions and recommendations.

3 The Community Food Co-operative Programme

Key points:

- The Community Food Co-operative programme began in 2004 as a small pilot in two areas in Wales. There are now 276 food co-ops across Wales (115 of which are in Communities First areas), with the target of achieving 315 by March 2011.
- The co-ops are run from a range of community and schools venues by a team of volunteers, with support from the Rural Regeneration Unit's General Manager, Produce Manager and six regional Food Development Workers. The current budget for the programme is approximately £500,000 per year.
- Food co-ops supply bagged vegetable, fruit and salad for a fixed price, which customers order and pay for a week in advance. Some food co-ops also provide additional produce such as eggs, meat and fish, depending on demand.
- On average, 1,429 volunteers across Wales give up their time each week to help to run the food co-ops. Assuming the co-ops are open on average for 45 weeks each year and each volunteer gives an average of two and half hours of their time for each of these weeks, this equates to over 160,763 volunteer hours per year
- The programme has 75 suppliers, which includes growers, wholesalers and local shops.
- By March 2011, the food co-ops had a total average of just over 4,400 customers per week across the 276 food co-ops, with a range of around 10 customers per week for the smaller ones to over 30 for the larger and more established food co-operatives.
- Based on figures for Feb-March 2011, the average number of bags being sold in a week is 6,800. The average bag cost is £3.00, which equates to approximately £20,400 of sales per week.
- Assuming co-ops run for an average of 45 weeks a year this is generating over £918,000 of income to Welsh businesses, meaning that for every £1 spent, £1.84 is generated.

This section provides a brief history of the Wales Community Food Co-operative Programme, and describes the current provision, in terms of how the co-ops are set up and run and who is involved in their operation. Within this section, data presented in terms of the numbers of volunteers, customers and sales is provided from the analysis of the latest membership data provided by the RRU (covering the period February to March 2011 and thus reflecting the current picture as far as possible). In some cases there are gaps in data so assumptions have been made with regard to *averages*. A full explanation of the methodology for this analysis is provided in Annex D.

3.1 History

The Community Food Co-op Programme was introduced as a pilot in April 2004, with the aim to improve access to fruit and vegetables in disadvantaged communities in Wales, and

to support local suppliers. A two-year grant was awarded to the Rural Regeneration Unit⁵ to develop at least 26 sustainable community food co-ops. The pilot was based on implementing a system of local food distribution networks and initially covered two areas; North Wales and South East Wales, with two Food Development Workers being employed to set up food co-operatives within these areas. The model for provision was based on a similar community food co-op initiative that had been implemented in Cumbria, run by the Rural Regeneration Unit.

In April 2006 funding was provided to the Rural Regeneration Unit (RRU) to support the programme for two further years. The pilot was subsequently extended and the team of Food Development Workers was increased from two to six,. By April 2008, a further three years' funding was provided to further expand the coverage of co-ops across Wales. A Welsh Produce Manager was also appointed within the RRU to increase the supply of Welsh grown produce into the community food co-ops to help to support the food economy and to explore possibilities with regard to providing a wider range of produce such as meat and fish through community food co-ops. In late 2010, it was announced that the programme would be extended for another year across Wales, continuing the emphasis on areas of social, economic and rural deprivation (including Communities First areas). A continued focus is the sustainability of community food co-ops, through supporting volunteers to have sufficient expertise and knowledge to run the community food co-ops as independently as possible.

3.2 Description of current provision

A standard model of provision has been developed by the programme which has been broadly adopted by all community food co-ops, with moderate adaptations being made to meet with individual co-ops' needs. As stated earlier, the model was adapted from a food co-op initiative that operated successfully in Cumbria.

All community food co-ops are led by a team of local volunteers who are linked to a supplier (via the Food Development Worker), and they work together to agree a payment and delivery system for the produce. The Food Development Worker assists the volunteers in finding a free venue to host the community food co-op. All community food co-ops offer bags of fruit, vegetables and salad that are available at a standard fixed price (generally either £2.50 or £3.00 per bag – although some smaller lower-priced bags are available in some community food co-ops). The produce items vary each week depending on what is available locally and seasonally and what offers best value. No membership fee is required.

Some community food co-ops also offer a wider range of produce from their supplier, such as 'half bags' of produce (which have half the amount of fruit, vegetables or salad), stir fry bags, small stew packs, and eggs. In a few cases co-ops also offer compost and large sacks of potatoes. Additional items and types of produce are offered where suppliers are able to

⁵ The Rural Regeneration Unit (RRU) is a Social Enterprise, governed by an independent Board. The RRU specialises in designing and delivering social and economic projects that help regenerate disadvantaged communities. Further information is available at <http://www.ruralregeneration.org.uk>

offer a wider choice (generally larger suppliers and growers), with volunteers advising about customer demand and requests.

Additionally, a few community food co-ops have been piloting a wider range of produce beyond fruit and vegetables and have been working with suppliers who offer; bread, meat or fish. The supply of these items of produce is also based on an advanced order pre-payment approach with community food co-ops piloting different approaches to offering a range of options, for example mixed meat packs, or being able to choose particular types of fish.

Customers place and pay for their orders a week in advance, and collect their orders from the co-op the following week. Volunteers place the order with the supplier and the produce is delivered at a regularly agreed time, mainly the morning of the community food co-op or in some instances the afternoon before. Volunteers prepare the bags of produce for customers, which are then ready for collection. Money taken from these is saved in the community food co-op's own budget to re-invest in other items needed (for example, cleaning sprays) on a no-profit basis.

The community food co-ops open for a fixed time on a weekly basis from a venue which does not require a rental or room hire fee to be paid. This is an important aspect of community food co-ops as there is no funding available to pay for venue costs. A range of venues are used by community food co-ops, including; community halls, schools, and workplaces. Volunteers take the lead role in co-ordinating and organising all aspects of co-ops' operational activities from placing and receiving orders with suppliers through to liaising with venues and promoting the co-op.

In keeping with a simple operational model, co-ops operate on a 'cost neutral' basis as far as possible with minimal expenditure being required. Co-ops are provided with a start-up kit which typically consists of:

- a cash tin
- order books and order sheets
- co-op signage
- a fruit and vegetable book (which includes useful information on health benefits, preparation and cooking ideas)
- tee-shirts
- aprons
- anti-bacterial spray and gloves (where requested)
- weighing scales (particularly for schools), and
- a supply of reusable bags.

Programme partners such as Communities First sometimes provide additional materials such as table cloths and additional bags. Co-ops have developed different approaches to generating funds to support the provision of additional consumables such as holding coffee mornings or selling excess produce. Volunteers also provide some additional items as and when they are required.

It is important to note that the community food co-ops themselves do not trade, but provide a channel for suppliers to sell directly to customers. Thus, any liability rests with the supplier until it passes to the customer.

3.3 Organisation and staffing

3.3.1 Strategic management

The programme has been funded by the Welsh Government, with funding being provided by two departments, the Department for Rural Affairs and the Department for Health and Social Services, with the latter providing the policy lead for the programme. Day-to-day operational management is undertaken by the Rural Regeneration Unit (a not-for-profit social enterprise), which employs a General Manager, a Welsh Produce Manager and six Food Development Workers. The current cost of running the programme is £500,000 a year which includes all RRU staffing as well as community food co-op start-up costs (provision of bags, cash box, leaflets, banners etc). Part of this budget is provided to the RRU and part is retained by the Welsh Government to support the programme, procure resources centrally at best cost, and cover programme evaluation costs.

A steering group is in place which includes all of the Rural Regeneration Unit team, plus the policy lead from within the Welsh Government who has responsibility at a strategic level, representatives from the Department for Rural Affairs, Communities First and internal or external visiting expertise as required. The steering group meets every quarter to review regional progress and activities, supply issues, overarching programme issues and emerging evaluation findings. Every six months, there is a review discussion and a forward-looking discussion (focusing on, for example, the numbers of co-ops, customers and volunteers and bag sales).

3.3.2 The RRU General/Project Manager

The RRU General/Project Manager has a background in community work (including previously as a Food Development Worker), and in addition to managing the project also works as the overall Manager of the RRU (with funding for three days a week to work on the community food co-op project coming from the Welsh Government), reporting directly to the RRU Board. The main role of the Manager is to ensure the running of the community food co-op project across Wales, ensuring that it reaches its key performance targets across Wales (to ensure continued funding) as well as across the areas within Wales. This includes reviewing progress at an area level and below and addressing any low performance issues relating to take-up, as well as focusing on the future via the development of an Action Plan for the project.

Furthermore, the Manager supports the Welsh Produce Manager and supervises the Food Development Workers as well as taking a strategic role with a view to the future sustainability (funding) of the project, raising the project's profile. The role is also guided by the RRU Board who provide a steer to the RRU's strategy and direction, and the Welsh Government who provide a policy steer for the project. The Manager thus has a key role in ensuring representation and profile in initiatives such as Communities First, Change4Life, Obesity Pathway, Appetite for Life, Health Challenge Wales and other related initiatives and programmes at a more local level (for example, supporting work with parents running 'cook and eat' sessions). Other tasks involve the sourcing of bags, drafting and production of leaflets and promotional materials.

This top-down approach complements the 'bottom-up' approach also adopted by the Food Development Workers and Welsh Produce Manager's work directly with suppliers. Notably,

the post requires far more time than the currently funded three days a week because of the diversity of the role and the areas to be covered.

3.3.3 The RRU Welsh Produce Manager

The post of Welsh Produce Manager arose in order to increase the amount of Welsh or locally grown produce by providing an agricultural link between the suppliers and the Food Development Workers. Thus, it provides an important 'expert' link between the suppliers (growers, wholesalers and retailers) and the community food-ops. The main role of the Produce Manager is thus to identify and engage with potential suppliers to raise awareness of the food co-op model and the benefits to the supplier and to encourage them to consider becoming a supplier. The Produce Manager also works closely with the Food Development Workers, putting them into contact with potential suppliers once areas or potential locations have been identified for new food co-ops.

The Welsh Produce Manager thus effectively operates a brokerage role, ensuring initially that the potential supplier fully understands the operating system for food co-ops (ie, that it is bulk delivery, ordered and paid for in advance and allows the suppliers themselves to decide the exact variety and quantity within specifically priced bags). The Produce Manager will typically contact a potential supplier by phone, and then visit them to offer further explanation. Once a supplier has agreed in principle to be part of the programme, their details are provided to the local Food Development Worker who may then visit potential suppliers themselves and discuss options with the volunteers. The Produce Manager will ensure that all potential suppliers in any given area are given a fair and equal chance of being selected by the volunteer as their supplier – through ensuring that they are fully informed as to what is required, the pricing and delivery strategy and so forth. The Manager will also intervene if required in the early stages of delivery if there are specific difficulties or teething problems.

As the role has developed over the years, the post-holder's knowledge of the local community networks and contacts has expanded. Thus, activities of the Produce Manager have extended well beyond working with food co-op suppliers. For example, because of the network of contacts the manager has been able to put suppliers of different produce in touch with one another to combine services available, nearby farmers have been introduced to stagger their vegetable planting to be able to trade together, and extend the season locally on a number of different vegetable items, and fruit has been supplied directly to a school's tuck shop from a supplier on route to a food co-op. In addition, the Produce Manager has linked growers to sources of advice with regard to diversification (for example, into horticulture) and access to funding.

Following the RRU's observation that there was considerable demand for other local food from food co-op volunteers and customers, the RRU has been piloting the supply of locally produced meat, fish, bread and eggs via the food co-ops. These are proving to be successful with both customers and suppliers, although there is some variation in the model used (for example, some sell advance-order pre-packed meat selections, whilst others may sell produce via a mobile meat van that operates at the same time as the food co-op. Despite the additional work involved in preparation and packaging (for 'high risk' items such as meat and fish), costs for the customer appear to remain competitive with the added advantage of being locally sourced.

3.3.4 Food Development Workers

A team of six Food Development Workers has been established with each having responsibility for defined geographical areas in Wales. The current areas are:

- south west
- south
- south east
- west
- north west
- north, and
- north east.

Food Development Workers' main responsibilities are to promote and develop community food co-ops by working with a wide range of organisations and community groups and supporting volunteers to set-up community food co-ops. They undertake a variety of tasks to achieve this including:

- raising awareness of community food co-ops
- presentations to local groups on community food co-ops
- conducting local risk assessments to ensure that community food co-operatives do not threaten the viability of local businesses and enhance the community
- identifying and involving local producers and suppliers
- making links with other local groups and agencies at community and local authority / local health board levels
- supporting and attending the launch of community food co-ops
- supporting the early development and running of community food co-ops and
- providing access and support on an on-going basis to community food co-ops within their area.

3.3.5 Volunteers

Each community food co-op is run by a team of volunteers who are responsible for liaising with the suppliers, taking orders and payment and processing orders. Volunteers will also record the number of bags purchased each week and bag up the items that are delivered from the supplier. Volunteers have diverse backgrounds and experiences which generally reflect the venue/location of the community food co-op. For example, community food co-ops in schools are generally operated by school staff and pupils, whereas community venues are generally run by volunteers who are often not in paid employment (or work part-time). The number of volunteers has continued to rise as the number of community food co-ops increases – currently around 1,429 volunteers are involved in running community food co-ops. This includes 'lead' volunteers (in schools, these tend to be teaching staff who may undertake the role during their lunch or break time) as well as other volunteers who support the community food co-op (in schools, this will include parents and/or pupils).

The average number of volunteers per community food co-op is around five. However, the number of volunteers varies significantly from two or three in some of the smaller community based co-ops to over 10 for some of the school-based co-ops where whole classes are involved.

Each volunteer will give up *at least* two hours of their time per week to support the community food co-ops – often this is more, particularly for the lead volunteers whose involvement extends beyond the bagging and distributing of produce to include sourcing a supplier, weekly liaison to place orders and discuss bag contents, set-up, promotion and awareness raising and so forth.

However, working on the assumed average of 2.5 hours per week, and that this takes place on an average of 45 weeks per year (taking into account holiday periods and other absences), this equates to over 160,763 volunteer hours a year (or the equivalent of 95 full time equivalent people in an average week). The economic cost of this volunteer time, assuming a minimum wage hourly rate⁶ (notwithstanding that in schools the volunteers include children, and staff already in paid work) is £21,721 a week (or £977.436 per year assuming co-ops run for 45 weeks out of 52).

3.3.6 Suppliers

The programme has 75 suppliers of fruit and vegetables, along with additional suppliers of meat, fish and bread. Suppliers include growers, wholesalers and local shops and can be broken down as follows:

- 32 retailers
- 26 wholesalers
- 12 growers
- 1 fish supplier
- 1 meat supplier
- 1 social enterprise
- 1 bread supplier and
- 1 wholefood supplier.

One of the suppliers, based in the North Wales, provides more than 50 co-operatives in the area.

Food Development Workers provide individual community food co-ops with the details of a number of suppliers who operate in their local area, providing samples of produce from these suppliers. The volunteers then select a supplier who they feel will best supply the needs of their co-op.

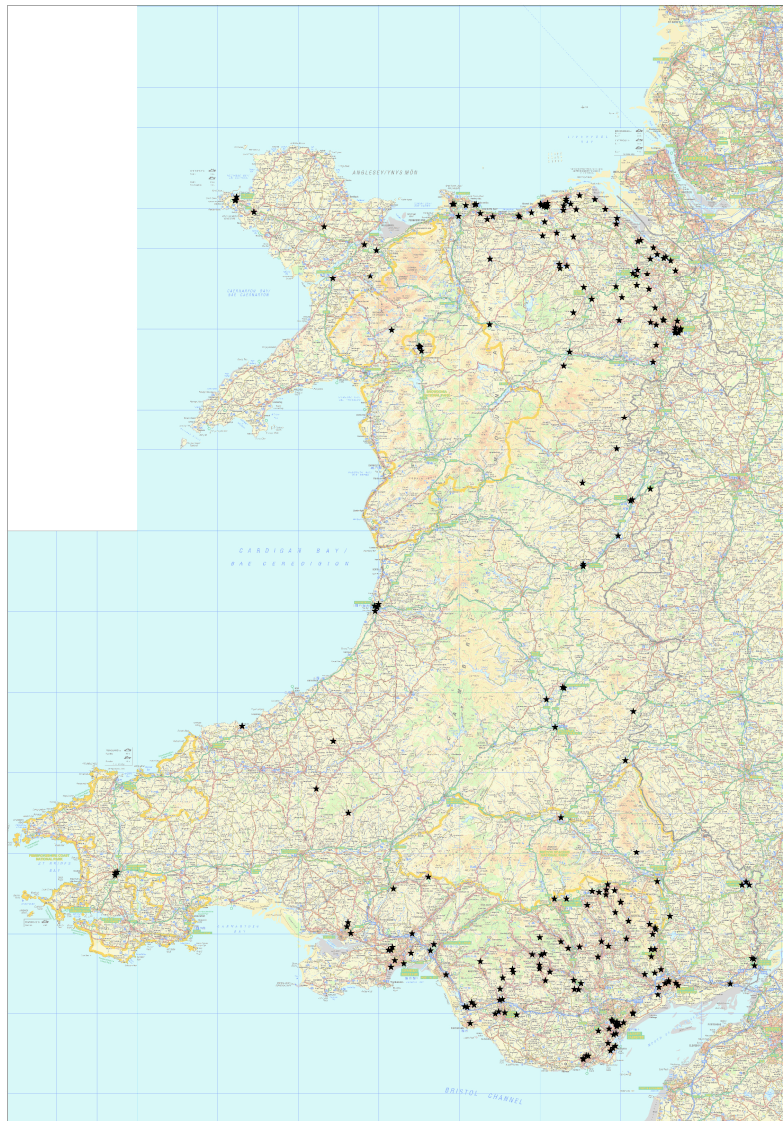
Volunteers and suppliers agree a mutually convenient delivery time for the produce. Suppliers deliver the produce in wholesale quantities with volunteers dividing it into individual bags.

3.4 Number, location and types of co-ops

By the spring of 2011, there was a total of 276 community food co-ops running. The chart below (Figure 1) indicates their geographical spread. One hundred of the current community food co-ops are based in schools with the remainder in a community-based setting or workplace.

⁶ £6.08 per hour from October 1st 2011

Figure 1 Geographical location of current community food co-ops (as of spring 2011)



Historically, the numbers of community food co-ops within mid and west Wales have been lower than in the other areas but much higher in the southern parts of Wales. This is largely to do with population density and a focus on Communities First areas. Recently, internal restructuring within the RRU has resulted in the recruitment of a part-time FDW to cover Ceredigion, Pembrokeshire and Carmarthenshire while mid Wales no longer has a dedicated FDW but is being covered by other FDWs from outside of the area. In addition, due to the high demand for community food co-ops within south Wales, an additional FDW was recruited and the area was divided into three (originally just two).

3.4.1 Identification and development of co-ops

Food Development Workers are responsible for identifying possible locations and organisations to host community food co-ops. This has been undertaken through Food Development Workers networking with a wide range of communities, organisations and individuals.

Over time the scope has widened and Food Development Workers have sought to work with schools and colleges to help to increase the number of families with children buying bags. This has resulted in just over a third of community food co-ops being based in schools.

3.4.2 Location of co-ops within communities

Identifying and securing suitable community-based locations for co-ops has been a significant feature of the programme. The role of Food Development Workers has been critical here in guiding and advising volunteers to locate co-ops at venues which are accessible and welcoming to a wide range of customers. Additionally, venues need to be available free of charge since co-ops are not able to operate to make a profit since this would affect their trading status.

3.5 Links with other programmes and activities

Part of the Food Development Workers' role is to forge local links and partnerships which can help to support and sustain existing community food co-ops as well as raising awareness of the community food co-ops and identify potential new sites. As a result, there is a strong network of links with organisations and individuals across both the statutory and voluntary sectors. This includes:

- local authorities
- Communities First partnerships
- community dieticians
- housing associations
- schools
- leisure centres
- healthy schools co-ordinators, and
- credit unions

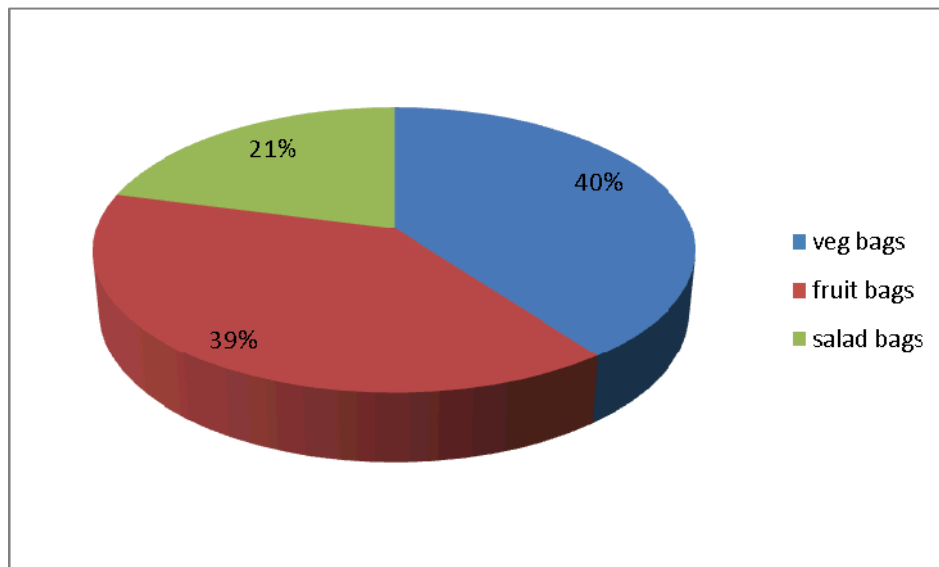
There are also some other food co-ops that have been started in Communities First areas. These operate via different models in terms of volunteer involvement and longer-term sustainability. The RRU is working with some of these community food co-ops to share good practice and to encourage volunteer-led approaches over the longer-term in line with the low-risk, sustainable RRU model.

3.6 Number of customers and bag sales

Based on the latest figures (February to March 2011), the community food co-ops had a total average of 4,420 customers per week across all 276 community food co-ops. This equates to an average of 16 customers per co-op per week with a range of around 10 customers per week for the smaller co-ops to over 40 in the larger ones.

The total number of bags being sold in an average week is 6,800 – approximately two-fifths of these are vegetable bags, two-fifths fruit bags and one-fifth salad bags. An average of 25 bags are sold per community food co-op.

Figure 2 Average bag sales – type of bag sold



Assuming co-ops run for an average of 45 weeks a year (taking into account closures over holiday periods) this is generating around £918,000 of income to Welsh businesses, meaning that for every £1 spent on running the programme (volunteer time aside), £1.83 is generated.

4 The Role of the Rural Regeneration Unit

Key points:

- The Rural Regeneration Unit provides a General Manager, a Welsh Produce Manager and six Food Development Workers to support the community food co-operative programme.
- A significant role is identifying and developing new sites for community food co-ops and establishing and maintaining relationships with volunteers, suppliers and local community groups and organisations.
- Intensive support from Food Development Workers in the early set-up stages was particularly important.
- Notable challenges were encountered in identifying suitable, free, venues for community food co-ops, with volunteers often needing support from Food Development Workers to find appropriate sites and negotiate access.
- Beyond the initial face-to-face support, telephone contact was maintained with community food co-ops, with the most common issue to resolve being access to additional bags for customers to take the produce home in. This was often felt to be not the best use of Food Development Workers' time and required an alternative solution.
- Ensuring the co-op volunteers understood the importance of the cost-neutral operating model for the food-ops was also an ongoing task.
- Ad-hoc requests for support tended to be around supplier issues that the volunteers were unable to resolve themselves (for example, ongoing quality problems or a new supplier needed), or around support with promotional/marketing activities.
- Food Development Workers would welcome more time to develop and expand new co-ops, particularly schools-based venues and others that had the potential to engage with families with children.

This section provides findings from discussions with staff from the Rural Regeneration Unit, presenting their perceptions of how the programme has developed and how co-ops can become sustainable. Discussions were held with the General Manager, the Welsh Produce Manager and six Food Development Workers.

4.1 Team roles and experience

The Rural Regeneration Unit team dedicated to working on the co-op programme in Wales had eight personnel in place during the evaluation comprising six Food Development Workers, each responsible for a defined geographic area, a Welsh Produce Manager who has responsibility for engaging with suppliers and providing ongoing support to them, and a General Manager who oversees the Food Development Workers, along with promoting the programme, liaising with partner organisations and providing strategic direction (see Sections 3.3.2 and 3.3.3 for further details of roles).

Members of the team have a diverse range of relevant occupational experiences, including working within health professions such as health promotion, nursing and dietician, agricultural and farming experience, and working as community volunteers.

4.2 Identifying new community food co-ops

Food Development Workers reported that identifying new sites for community food co-ops and developing these was a significant element of their role. They advised that extensive groundwork needed to be undertaken within communities and with partner organisations to ascertain whether there were potential locations and groups that could set up and run a sustainable community food co-op.

Linking with existing community groups and organisations was stated as being essential in the early stages of appraising an area's suitability for hosting a community food co-op in order to gain a good understanding of communities' needs and an appreciation of the local food suppliers in the area. Food Development Workers discussed how community food co-ops needed to supplement and complement the food offered in local areas in order to maximise co-ops' sustainability and also to ensure that new co-ops did not adversely affect existing local trade.

Food Development Workers also discussed how ensuring that a committed team of volunteers are engaged is a critical stage in developing community food co-ops since volunteers are the foundation stones to establishing community food co-ops. Therefore, Food Development Workers advised that publicising community food co-ops through meeting with health and education professionals, delivering presentations to local community members, and distributing information materials / leaflets was a significant part of their role in developing a good level of interest amongst target areas and target groups. Undertaking these activities with established groups and activities was reported as being a good starting point since it provided a basis upon which to build a co-op. However, Food Development Workers also advised that it was important to ensure that groups were as open and accessible to local community members in order to maximise co-ops' potential customer base.

4.3 Establishing new community food co-ops

Once a group of volunteers has been engaged with, Food Development Workers support them in identifying a suitable venue to host the co-op. This was described as being a challenging aspect of their role since all venues need to be available free of charge as co-ops are not able to generate an income. Food Development Workers advised that they often work with volunteers to negotiate free use of community venues, through explaining to venue proprietors and managers how the community food co-op model works. Food Development Workers discussed how some volunteers have sought to open co-ops based in their own homes and that this approach was not generally successful as it limited the number of customers who may be willing to use the co-op as they were not in a community space.

Food Development Workers reported that once a venue and team of volunteers were secured, they provide the volunteers with information about produce suppliers, generally giving volunteers three suppliers to choose from. It was felt that volunteers should have ownership of the relationship between supplier and the co-op as early as possible so that they would be confident in dealing with the supplier. Additionally, Food Development Workers stated that volunteers would be best placed to know what type of supplier would suit the local community best and know about any issues that needed to be taken into consideration, such as possibly using a local supplier. Food Development Workers advised

how they would organise presentations by suppliers to co-ops so that volunteers could get an idea of the type of produce provided and ask questions directly to the suppliers.

Supporting volunteers to organise and run launch events and promotion activities to get their community food co-ops off the ground was also reported as being a key aspect of Food Development Workers' role. Food Development Workers discussed how they would sometimes give samples of produce to potential customers to encourage them to use the co-op, but would ensure that this was a single item of fruit or vegetables rather than a bag of produce since this could 'devalue' the produce which was already being sold at a very reasonable price.

Co-ops have been provided with intensive support from Food Development Workers during the first few weeks of operation, with Food Development Workers being on-site to show volunteers how to prepare bags of produce and process future orders. Being available during these first few weeks was considered as being critical by Food Development Workers in supporting volunteers to develop their confidence and also to troubleshoot any teething problems, such as addressing issues with produce quality and identifying where to store produce.

Food Development Workers reported that it was important for volunteers to understand that there would be less face-to-face input as time progressed to ensure that the co-ops became self sustainable. It was felt that most co-op volunteers were satisfied with this approach and that there were only issues where teams of volunteers did not get on well. Ensuring that teams of volunteers worked well together was identified as being a challenging issue to address since there was limited time available to undertake ongoing team building activities with volunteers. Nevertheless, it was reported that most groups of volunteers worked well together.

Food Development Workers discussed how they had been seeking to get more schools involved with community food co-ops as it was identified that this would be a good way to access parents of young children. Food Development Workers were having mixed outcomes to linking with schools, with primary schools proving to be easier to make contact with since their timetables being more adaptable to incorporating community food co-ops. The RRU team advised how it has developed a bilingual DVD for schools to help promote community food co-ops and how this was proving to be a useful marketing tool when contacting schools.

4.4 Provision of ongoing support

Most ongoing support has been provided via telephone contact by Food Development Workers, with volunteers being advised to contact their Food Development Worker when they need help or advice with an issue. Additionally, Food Development Workers reported that they maintain regular contact with co-ops to check whether any additional support is required.

Food Development Workers advised that requests for additional bags for produce was the most frequent area of support that co-ops had been calling upon. This was felt to be a time consuming task that did not make best use of their time and skills, and they were continually seeking to find ways to advise volunteers to get customers to return and recycle their bags. Food Development Workers perceived that in the early stages of the programme, co-ops and customers had become too reliant on an ongoing supply of bags and that it was now difficult to get them to change their habits.

Providing advice and guidance on the community food co-op model has also been a frequent area of ongoing support, since co-ops have often sought to investigate ways in which to make an income from running a community food co-op. Food Development Workers advised that they need to explain to co-ops that the operating model has been developed to be as simple as possible to ensure that communities and individuals are not taking financial and trading risks that would be difficult to rectify should they make a loss or have problems around their trading status resulting in liabilities around the produce. It was felt that co-op volunteers are generally understanding of these issues once they have been explained to them and are content with working within the model.

Issues with suppliers are often highlighted to Food Development Workers, however in most cases volunteers are able to manage these themselves as they are generally one off issues relating to the quality or the quantity of the produce which they resolve with the supplier. Food Development Workers reported that they get involved when there has been an ongoing issue with a supplier or if the supplier decides to cease delivering to a co-op. In these cases Food Development Workers advised that they work with the Welsh Produce Manager to either resolve the issue or provide the co-op with new supplier contacts.

4.5 Facilitating the sustainability of co-ops

Undertaking ongoing awareness raising activities to promote community food co-ops amongst communities and professionals was identified as being a key activity for Food Development Workers (in addition to the more strategic roles of the Manager and Welsh Produce Manager) in ensuring that co-ops have a high profile amongst target groups. Additionally it was discussed how these activities helped to ensure that community food co-ops were linking with other initiatives and programmes promoting healthy eating.

Linking with partners and events where cooking demonstrations were being delivered to target groups reported to being of great value in engaging with target groups, especially parents of young children since these helped to give potential and existing customers ideas of how they could use co-op produce.

Intervening at an early stage where there were problems was also identified as being important in supporting co-ops to become sustainable. Checking data about bag sales and maintaining periodic contact with co-ops were discussed as ways of being able to track and identify where there were potential issues. Being able to respond quickly when significant issues arose, for example, threatened loss of venue or supplier were identified as being important to address to minimise the impact to customers.

Issues which were identified as being more difficult to address swiftly included the loss of key volunteers from a co-op, since in many cases lead volunteers have undertaken a significant number of responsibilities, (preparing produce, organising orders, liaising with venues for example). Identifying new volunteers willing to take on a great deal of responsibility was identified as being particularly challenging when seeking to restart some co-ops.

4.6 Areas for future development

Food Development Workers discussed how they felt there was still the potential to develop and open more community food co-ops within many communities. Establishing community food co-ops in groups and organisations working with parents of young children was felt to

be a particular area of development that needed further exploration in order to ensure that more parents were buying fresh fruit and vegetables.

Seeking ways to work with schools to identify ways to extend their opening times beyond school term times and with more parents and community members was also identified as an area for future exploration and development.

Helping community food co-ops to become more sustainable by using volunteer time, rather than being reliant on the input of paid professionals on community-based programmes (for example, via Communities First) was also identified as being an area of ongoing development.

Raising target groups' awareness and understanding of healthy eating through ongoing promotional activities and cookery demonstrations was an area which Food Development Workers wanted to undertake further work as it was felt to be critical to engaging with target communities and encouraging them to purchase and eat more fruit and vegetables.

5 The Community Food Co-operative Volunteers' Perspective

Key points:

- Food co-ops rely on volunteers to run them. A telephone survey of 156 'lead' volunteers and qualitative discussions with volunteers during visits to six different food co-ops qualitative work was undertaken to explore their experiences and views.
- Most volunteers are female, aged 40 or over. Just over three fifths are in work and a fifth retired with the remainder not working/caring for dependants.
- Volunteers tended to have been involved for some time, and planned to continue to do so. In almost all cases, they would recommend being a volunteer to others. Nevertheless, many noted challenges in recruiting and retaining other volunteers and customers, as well as occasionally dealing with supply issues.
- The main reasons for becoming involved related to wanting to benefit the community, to encourage healthy eating and to support the local food industry. For schools based co-ops, helping to support Healthy Schools activities was particularly important. Volunteers perceived that the food co-ops have resulted in increases in fruit and vegetable consumption and more local produce bought.
- Additional (and generally unanticipated) positive outcomes for volunteers included learning something new, meeting new people and gaining new skills (linking in some cases to raised employability).
- Volunteers also felt that the food co-ops offered excellent value for money as well as promoting healthy eating and supporting the local community.
- The majority of food co-ops represented did not run alongside other activities, suggesting there is some scope for them to do so, particularly when based in community settings. Where provided, examples of other parallel activities included adult learning, tea/coffee, health activities, credit unions and lunch clubs.
- In terms of sustaining food co-ops, volunteers had worked hard to encourage customer retention through promotional leaflets/posters, giving information on healthy diets and recipes and so forth. Volunteers suggested a need for more support on how to advertise and promote co-ops
- Support from Food Development Workers was viewed very positively, although given the very high levels of satisfaction with the availability and intensity of support there may be an over-reliance in some cases.

5.1 Introduction

The community food co-ops rely on volunteers to run them (with initial support from the Food Development Workers). As such, their involvement and support is critical to the success of the schemes so insights into their experiences help to understand why people volunteer to become involved in the co-ops.

A small-scale telephone survey was carried out with nominated 'lead' volunteers from the community food co-ops to gather their thoughts and experiences of being involved in the

programme, identified from the database of contacts for 346 community food co-ops (which included both 'live' and closed co-ops) provided via the Welsh Government. The research was conducted during July 2010, with a booster of school-based co-ops conducted in early September. In total interviews were carried out with 156 'lead' volunteers (representing 156 different community food co-operatives); the large majority (69%) were still involved in their co-op. The overall response rate was 55% (based on the contactable sample) – there was a relatively high proportion of 'no response' due to the inclusion of schools in the contacts file (which were closed during the main fieldwork period). The school contacts were, however, revisited in early September to boost the number of schools represented in the overall sample.

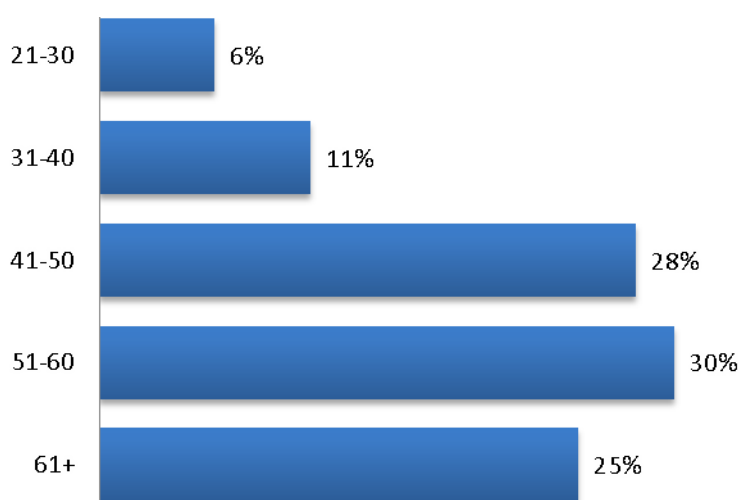
Of the 156 interviewed, 48 represented schools-based co-ops (mirroring the overall proportion of school-based co-ops). As such their involvement is somewhat different to the other volunteers as in the main they have volunteered to be involved in the scheme whilst in a paid capacity (that is, as a member of staff at the school).

This section of the report provides an overview of the profile of the lead volunteers involved in the running of the community food co-operatives, based on a sample of lead volunteers from the overall lead volunteer population. It provides information on their characteristics and reasons for becoming involved in the co-ops. The section also reviews their thoughts and experiences of being a volunteer, including their views on the impact on them and on their customers. A copy of the questionnaire is provided at Annex A.

5.2 Profile of the volunteers

The majority of volunteers interviewed are female, with only a fifth (19%) stating that they are male. Most of the volunteers (83%) said that they were over 40 years old at the time of the survey, with the age group of 51-60 having the highest level of representation (30% of the sample). Only 6% of the volunteers were aged between 21 and 30, and twice this proportion (11%) said that they were aged between 31 and 40.

Figure 3 Age profile of lead volunteers (valid responses only)

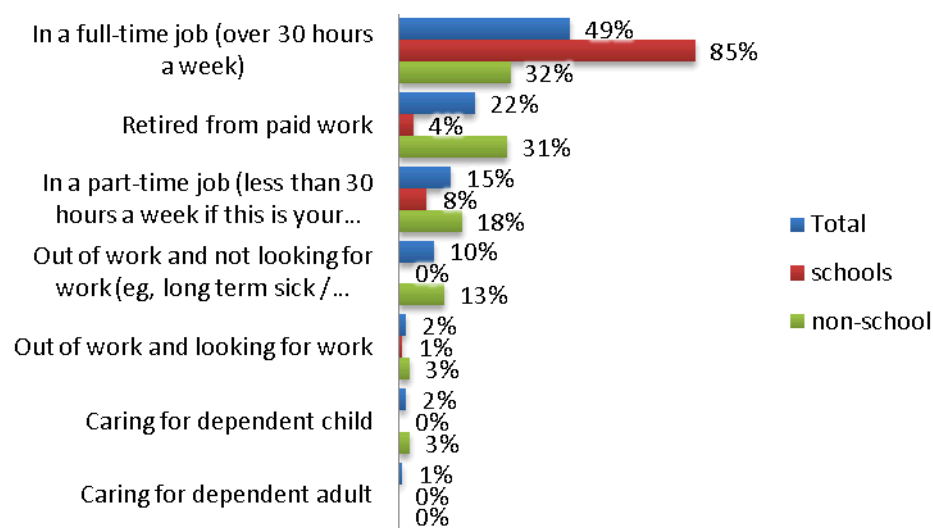


Base: All respondents (155)

The overwhelming majority of respondents are white British (96%) with small minorities representing Asian British, mixed and White non-British groups (all 1%).

Overall, just under half of the sample (49%) said that they were in a full-time job (over 30 hours a week) at the time of the study, whilst around one in five (22%) said that they were retired. Looking separately at the non-schools based co-ops, the proportion in full-time work reduces to around a third (32%), with another third (31%) stating they are retired.

Figure 4 Economic status of volunteers (valid responses only)



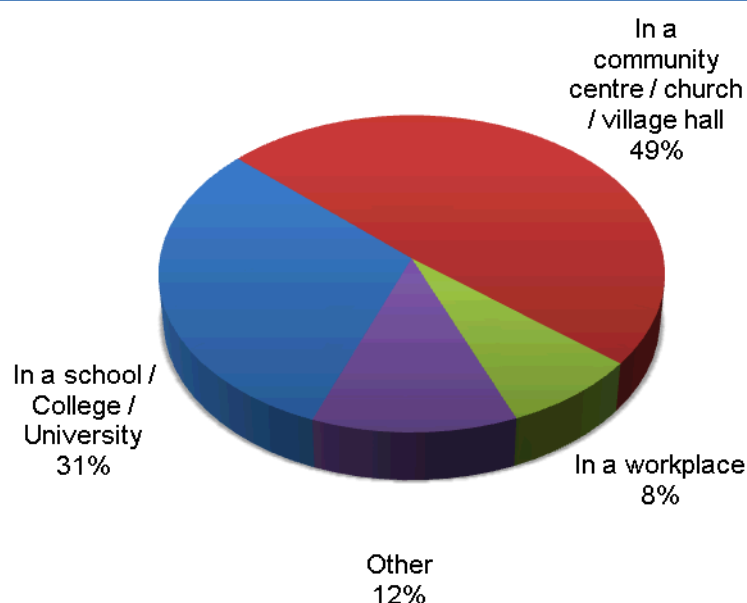
Base: All respondents (156)

5.3 Community food co-op location and activities

Around half of respondents (49%) were volunteers based in a community venue, for example a community centre, church or village hall. Three in ten (31%) said that their co-op was based in a school, college or university and 8% stated that a workplace was used for their co-op.

Other venues (as stated by 12% of the respondents) included local homes and local clubs for young people.

Figure 5 Respondents' co-op location (valid responses only)



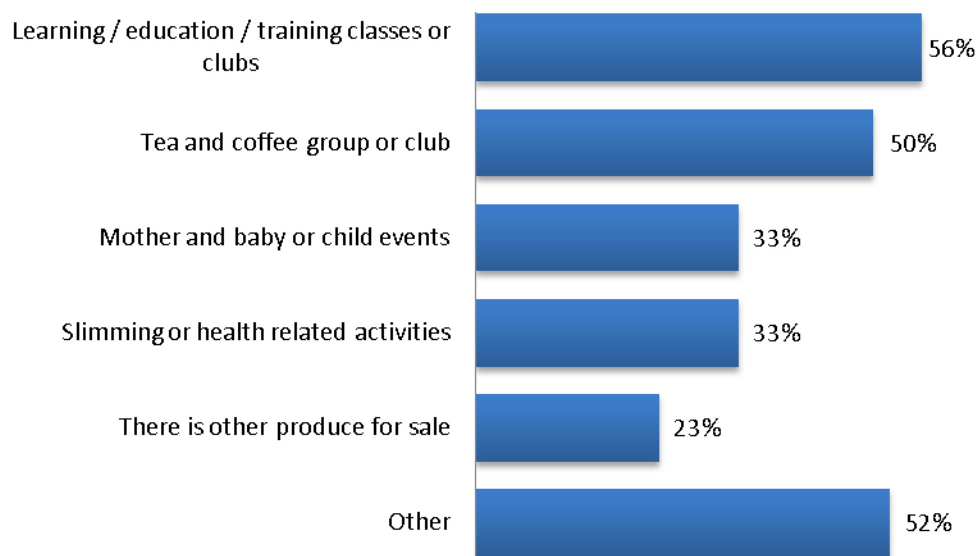
Base: All respondents (156)

Many of the volunteers (41% of the total sample) reported that their co-op ran alongside other activities. Over one half of this subset of the sample (56%) said that their co-op ran in conjunction with learning/education/training classes or clubs. A slightly smaller proportion of 50% mentioned tea and coffee groups. Partnering mothering and baby clubs or child events were mentioned by 33% of the respondents, and slimming and health-related activities were cited as partnering initiatives by 33% of volunteers. Of the 64 volunteers that reported that their co-op ran alongside another activity or initiative, 55% of them were based in community centres.

Over half of respondents (52%) described other initiatives or activities. These included credit unions or other credit systems and regular lunch clubs. Respondents who were involved in school-based co-ops also reported cookery clubs or classes, as well as healthy eating and 'Eco School' initiatives.

Other examples of partnering activities included farmers' markets, enterprise or volunteering initiatives, the Citizen's Advice Bureau and a Police surgery.

Figure 6 Partnering initiatives (valid responses only)



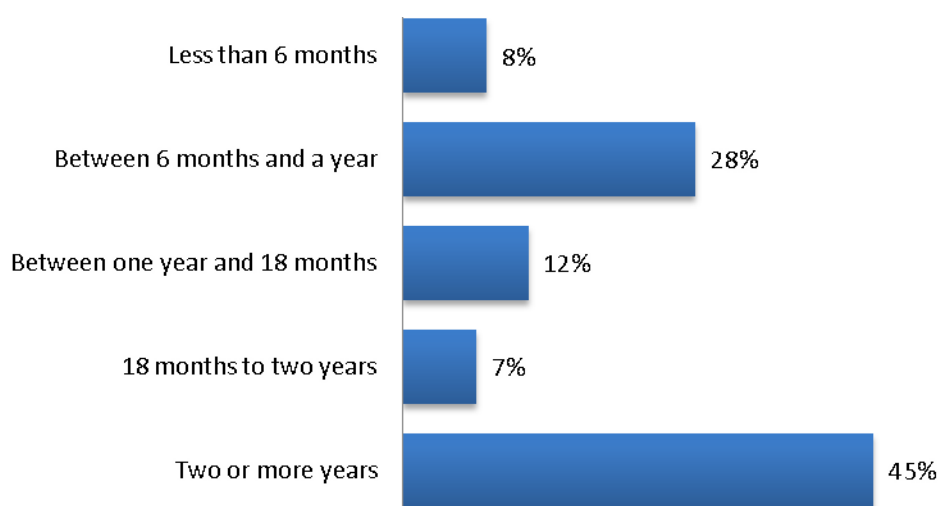
Base: Those whose co-op runs alongside other activities or initiatives (64)

5.4 Involvement in the community food co-op

At the beginning of the interview, the respondents were asked if they were still involved in their co-op. Around seven in ten (69%) said that they were still involved, and nearly all of these (99%) said that they saw themselves staying as a volunteer for the next twelve months.

Volunteers tended to have been involved in the community food co-op for some time. Close to half of respondents (45%) said that they had been volunteers for two or more years and a similar proportion (47%) for between 6 months and two years. Just under one in ten (8%) were relative newcomers to volunteering.

Figure 7 Length of time involved in the co-ops (valid responses only)

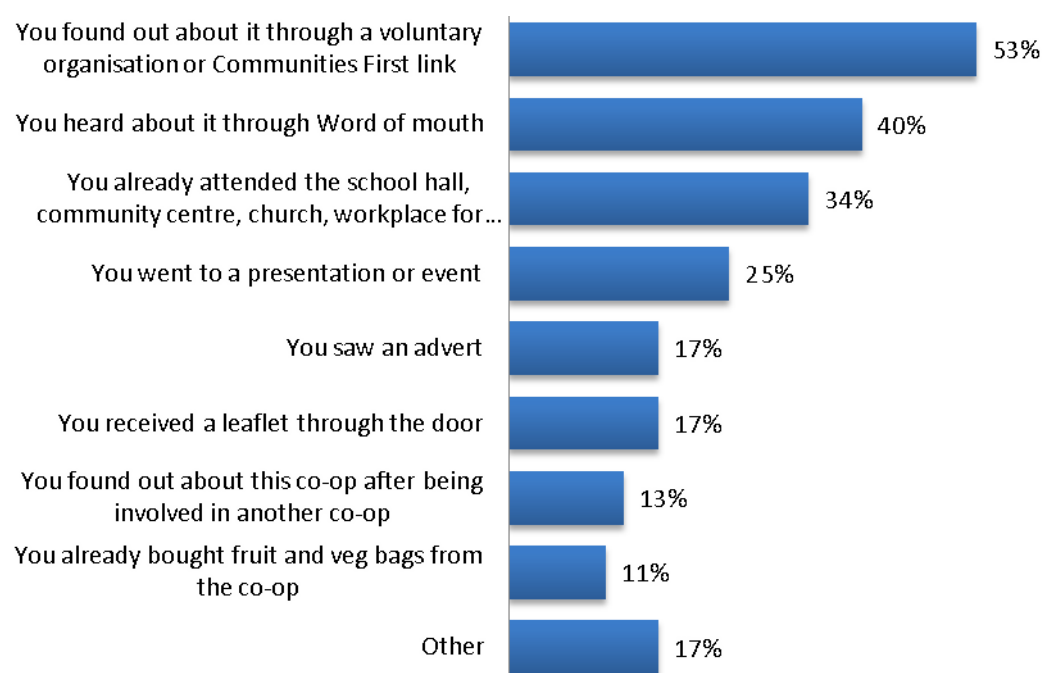


With regard to finding out about the volunteering opportunity, most had done so via word of mouth, either through a link via a local voluntary organisation or a Communities First link, or through more informal dialogue including friends and family members as well as the Food Development Workers and the Rural Regeneration Unit itself.

A third (34%) said that they already attended the venue of the co-op for other reasons and found out about it from those activities. This suggests that around two-thirds of volunteers had not been involved in the community venue prior to becoming involved with the community food co-op.

Seventeen percent of the sample cited other ways of finding out about the volunteering opportunity, and these mainly centred on information on the Internet and advertisements in local newspapers. Unsurprisingly respondents from co-ops based in schools advised that they found out through schools (either their own or another local school), or via the Welsh Network of Healthy Schools initiative.

Figure 8 How volunteers found out about the opportunity (multiple response)



Understanding volunteers' motivations for becoming involved provides an important insight into engagement in community based initiatives such as the community food co-ops. In order to explore this, respondents were asked to indicate their level of agreement with a

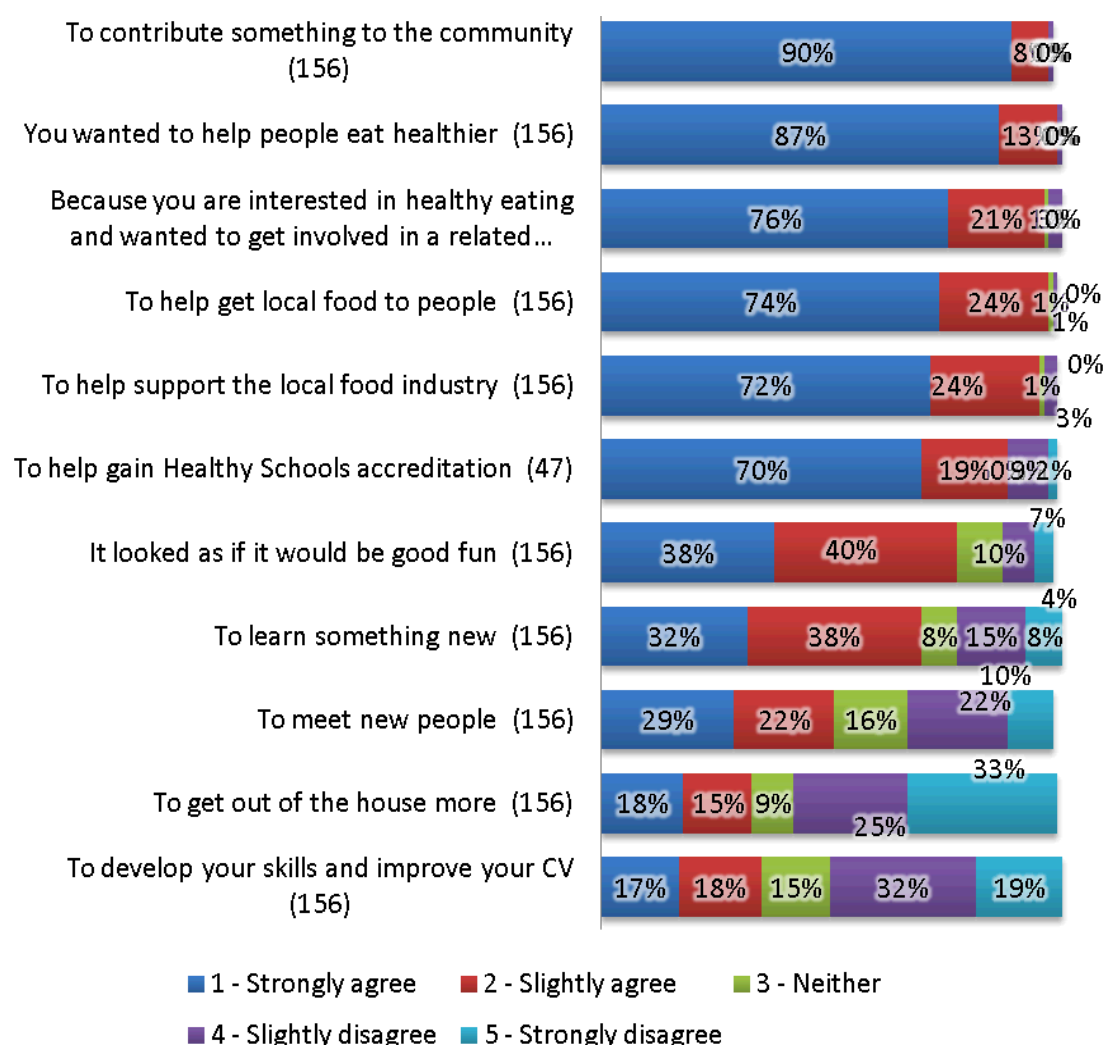
number of statements relating to possible reasons for becoming involved. The strongest motivations were generally altruistic in nature, relating to wanting to benefit the community, to encourage healthier eating to the community and to support the local food industry.

Almost all respondents (99%) agreed they wanted to get involved in the co-ops to contribute something to the community, and a similar proportion said they wanted to help people eat healthier (99%). Agreement was also very high for helping to get local food to people (97%) or being interested in healthy eating (96%). A similar proportion said they got involved to support the local food industry (96%).

Where respondents were involved in a co-op based in a school, they were also asked if they got involved in the project to help gain a Healthy Schools accreditation; almost four fifths (89%) agreed – with the large majority agreeing strongly.

The prospects of developing skills and improving CVs or getting out of the house more were less common reasons given by volunteers for becoming involved but was still important for over a third of respondents (35% and 33% respectively).

Figure 9 Motivations for getting involved (valid responses only)



Sample base in parenthesis

In addition to providing reasons for becoming involved in the community food co-ops, volunteers were asked to reflect on the *actual* benefits to them that the experience had brought. All of the respondents (100%) felt they had contributed something to the community, and 99% said that they thought that they had helped people to eat healthier.

There were also some more personal benefits that the volunteers had benefited from. These included the benefits of learning something new (81%), meeting new people (79%), the development of personal attributes e.g. more confidence (62%) and the development of skills and improved their CV (58%). Around two fifths of the volunteer sample (43%) stated that they had benefited simply from getting out of the house more.

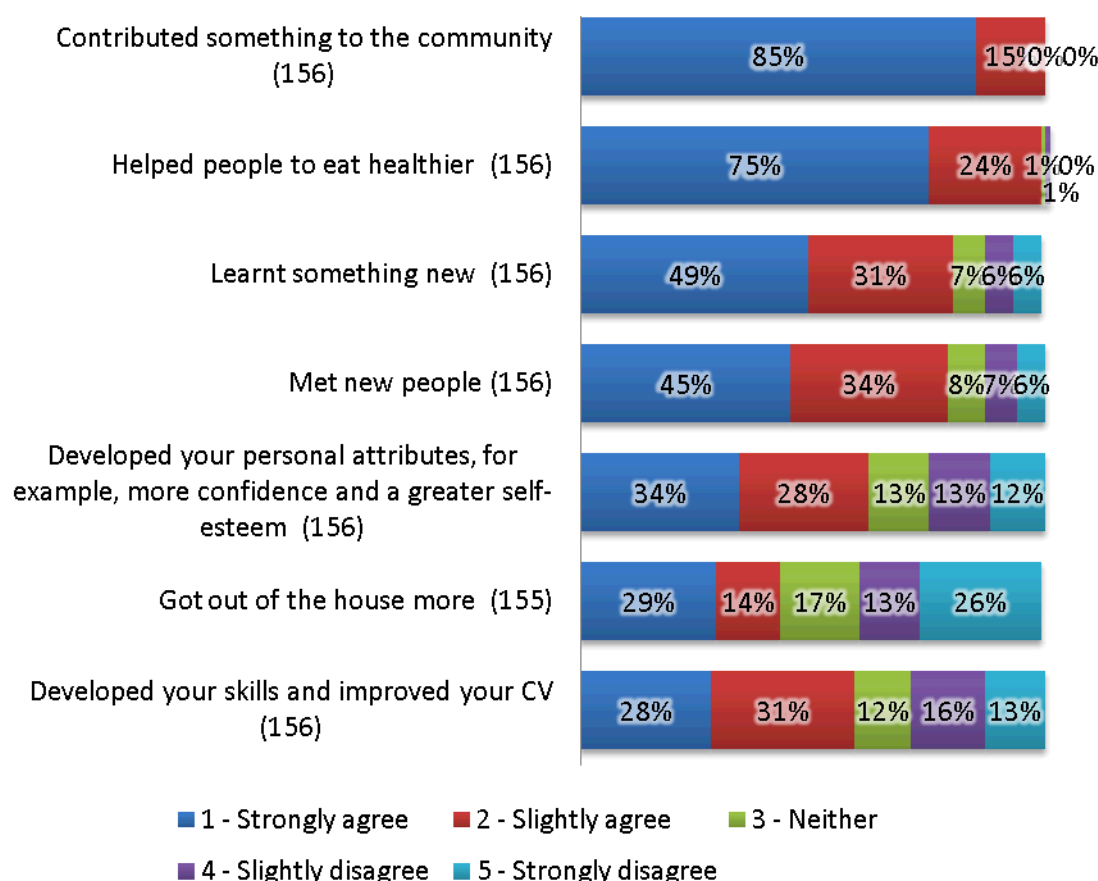
Rural community food co-op, established 1+ years, also selling other produce (meat/fish)

The group of volunteers running this community food co-op discussed how they very much enjoy working together as a team and advised that the positive team spirit that they have developed has helped to embed the community food co-op which has been running for over 14 months. They discussed how they all have different skills and contacts within the community which helps in publicising the community food co-op. For example, two volunteers had moved to the area and had prior experience of volunteering for a community food co-op elsewhere so they were able to advise the team about the most efficient ways to pack the bags. Additionally one volunteer advised that she was seeking employment following her son starting nursery, however she was unable to secure employment since she did not have any recent work experience. She heard about the community food co-op and thought that it would be one way to get out of the house and meet new people. She discussed how being involved in the community food co-op has been beneficial to her in developing customer service skills and in liaising with the suppliers, since she has been given responsibility organising meat orders for the community food co-op. She described how she now feels more confident about her future employment prospects due to her volunteering experience and also spoke about how the social aspects of being part of the food co-op had made her feel more positive. This volunteer is also looking at ways to get more young parents to use the community food co-op and is working with other volunteers to look at running demonstrations as a way to publicise the community food co-op.

It is interesting to note that overall the volunteers perceived to have benefited more from contributing something to their community and helping people to eat healthier than for their own personal gains. However, it is also notable that the *actual* individual benefits often far exceeded the initial reasons for becoming involved. For example, just over half (51%)

agreed (strongly or slightly) that a reason for becoming involved initially was to meet new people (see Figure 9). However, on looking at the *actual* benefits, almost four fifths (79%) agreed that one of the benefits had been meeting new people. Similarly developing skills was less important as a reason to become involved in the co-op (35% agreeing) but a greater proportion (59%) agreed that this had been a benefit. This indicates that, in the main, volunteers gained far more personal benefits from becoming involved than they had originally anticipated, or expected.

Figure 10 Volunteer benefits (valid responses only)



Sample base in parenthesis

Urban school-based food community co-op in Communities First area, established 2+ years

This school has applied a range of approaches to enable pupils from across the school to have experience of volunteering for the community food co-op. In the early stages pupils in Year 5 took responsibility for getting the food co-op up and running by preparing and delivering a presentation for staff and pupils in the school. As time has gone on, the school has targeted different groups of pupils to be involved in order to support their learning and development. For example, a group of young people who need additional support with their learning currently prepare the bags of produce. They work in small teams with the support of staff and a parent volunteer to pack the bags. Pupils are encouraged to apply their numeracy and literacy skills in preparing the bags through counting each type of produce and working out how many of these need to be included in each bag.

Pupils spoke of how they enjoyed learning about the different types of fruit and vegetables that were supplied, especially if these were unfamiliar. Pupils also discussed how they liked working together as a team to get the bags ready in time for customers to collect them.

5.5 Recommending the co-ops to a friend

When asked if they would recommend becoming a volunteer to their friends, the vast majority (96%) of respondents said yes. When asked why they would recommend becoming a volunteer there were numerous different responses.

The key reasons for recommending becoming a volunteer were as follows:

- it promoted healthy eating and well-being
- it facilitated the availability of local produce
- it was good for the local community
- the social aspect and developing new skills and
- it was an enjoyable experience.

5.5.1 Promoting healthy eating

Many respondents said they would recommend volunteering because the co-op '*encourages people to eat healthily*', and because being involved in the project is a '*good opportunity to eat healthier*', both for themselves and for the customers:

"Because healthy eating is important to everyone."

Others described the opportunities for raising awareness of healthy eating, by encouraging people to '*learn about the fruit and vegetables*' and '*try what you have not tried before*':

"I see the benefits it has, as families who normally would not buy, will buy."

5.5.2 Availability of local produce

A number of respondents said they would recommend volunteering at the co-ops because they appreciated being able to *'buy healthy produce at low prices'*, particularly where they perceived that access to cheap fruit and vegetables had previously been limited:

"It is an excellent value for the food we receive"

"Once the local produce are tasted, you would not want to buy from the supermarkets."

The co-ops were therefore felt to be a way of *'advertising local produce'*. Some respondents reported the environmental benefits of encouraging people to *'buy more produce locally'*, as well as the positive impact this would have on local businesses:

"It could help to lower the carbon footprint and encourage the sales of local produce."

5.5.3 Local community benefits

A key theme within open-ended responses was the community aspect; many respondents said they would recommend volunteering as a way of *'giving something back to the community'*, and helping out in the community also offered a *'feel-good factor'* for volunteers:

"It is good for [the] community and it makes you feel worthwhile."

Some felt that co-ops could *'help to create links between communities'*, encouraging greater interaction between local people:

"It gets you involved in the local community and [you] meet people that you would normally not meet".

Some respondents, particularly those from co-ops based in schools, advised that it was *'good for the children'*, in terms of encouraging them to develop new skills (for example in enterprise), but also for teaching them about healthy eating:

"It can increase healthy and local food consumption in young people and increase children's understanding of a healthy diet."

5.5.4 Social aspect and developing new skills

Respondents described how they enjoyed the social aspect of volunteering, particularly *'meeting new people'*, and that volunteering on the project *'gets you out of the house'*:

"This is because it is friendly and to have lots of people to talk to for a couple of hours."

A number of respondents also said they would recommend volunteering as a way of developing new skills, particularly communication skills, or skills in business and enterprise:

“It builds their confidence, good for their CV and can improve their people skills.”

5.5.5 An enjoyable experience

Finally, a number of respondents simply said they would recommend volunteering because they enjoyed it:

“This is because it is fun, enjoyable and always good, and a nice thing to do.”

“It's enjoyable to see the people come and they go away very satisfied.”

5.6 Difficult aspects of the volunteer role

Volunteer respondents were asked in the survey about the most difficult aspects of their role. Around three in ten (31%) respondents said that there was ‘nothing’ difficult about the role, however the majority of respondents did provide examples of things they found difficult. These included:

- recruiting and retaining volunteers
- finding the necessary skills
- finding the time
- issues with suppliers
- attracting and retaining customers, and
- bureaucracy or lack of support.

5.6.1 Recruiting and retaining volunteers

Some of the main issues experienced by respondents were around finding volunteers. Respondents reported difficulties in recruiting volunteers or *‘getting people involved’*, with a couple who had trouble recruiting enough volunteers overall:

“We did not have enough volunteers which meant we had to work harder.”

After managing to recruit volunteers, a number of respondents then had difficulty with *‘trying to keep the other volunteers coming in and keeping their interest’*.

Respondents recognised that being involved in the co-ops required a commitment that it was not possible for some volunteers to maintain:

“I think the students are quite young, they are willing, but it is difficult for them to turn up every week.”

5.6.2 Finding the necessary skills

A few respondents advised that they had difficulties finding the necessary skills required to manage co-ops, for example in maths or organisational skills:

“To know the price increases of the fruit and veg, and apply the same amount in each bags.”

“At the very beginning it was hard because of dealing with numbers and having to organise things. My skills in those areas are now a lot better.”

Others reported difficulties with team-work or co-operation between different people, and in getting the team of volunteers to run effectively:

“Different personalities, so getting everybody to gel and work together.”

5.6.3 Finding the time

Difficulties with ‘*finding the time to get it organised*’ or ‘*allocating the time to run the co-op*’ was a problem mentioned by some respondents. This was notable in schools particularly, where co-ops had to be planned around the school timetable and be open at a suitable time for parents to collect bags and place orders.

5.6.4 Issues with suppliers

Issues with the suppliers of local produce, in particular with the quality or the variety of produce available were reported by some respondents:

“I think we had a bit of a issue with the food not being of high quality, occasionally and the range of the variety of produce.”

A few also advised that there had been difficulties with suppliers’ delivery times:

“When we had bad produce, from the supplier and when the supplier turns up late.”

5.6.5 Attracting and retaining customers

Such issues with the quality of produce had for some respondents led on to further difficulties, in terms of customer satisfaction:

“The suppliers are letting us down on the quality of produce, and as a result the numbers have dropped and this means that we have to start again to attract them.”

For other respondents, there were difficulties in attracting customers in the first place, in terms of promoting the co-ops and getting people ‘*to know and understand*’ the purpose of the project, and raising interest in the local community:

“I think it was explaining to people what we were doing as they did not understand at first and also getting people to join in.”

Some also cited difficulties in ‘*attracting the people who will benefit the most*’ for example ‘*young mums*’ or other groups who they perceived as being a key target audience:

“Trying to get the customers interested, especially young parents with children.”

5.6.6 Bureaucracy or lack of support

A minority of respondents reported finding themselves limited by constraints of the project, and wanted to provide more to their customers, for example:

We were limited to what we could do, as we could not deliver the bags.

A very small number also mentioned a 'lack of backing' from authorities such as the Council or Rural Regeneration Unit.

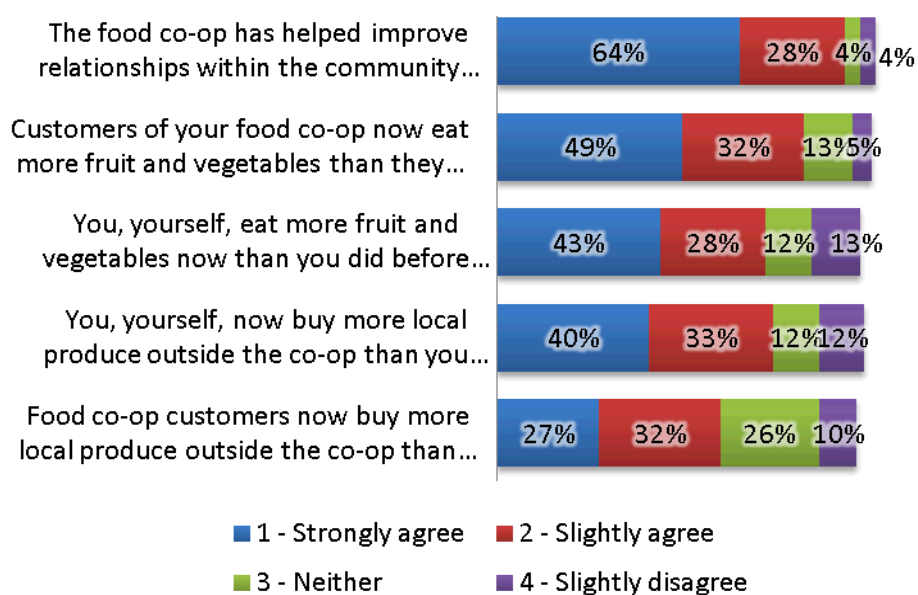
5.7 Impact of the co-ops – volunteers' perspectives

Volunteers were asked to consider the impact of the community food co-ops on themselves and what they perceived the impact had been on their customers. The volunteers perceived that the community food co-op has resulted in (Figure 14):

- customers of the community food co-ops were eating more fruit and vegetables than they did before (81% agreed);
- customers of the co-ops were buying more local produce outside the co-op than they used to (59%)
- the volunteers themselves bought more local produce outside the co-op than they used to (73%); and
- the volunteers themselves eating more fruit and vegetables than they did before they got involved in the co-op (71%).

Furthermore – and importantly - 92% of the volunteers surveyed stated that they felt that the community food co-op had helped to improve relationships within the community.

Figure 11 Impacts of the scheme (valid responses only)



Sample base in parenthesis

The perceived impact identified by the volunteers is also discussed from a customer perspective in Section 4, which reveals a similar pattern in terms of increased fruit and vegetable food consumption as a result of being involved in the community food co-op.

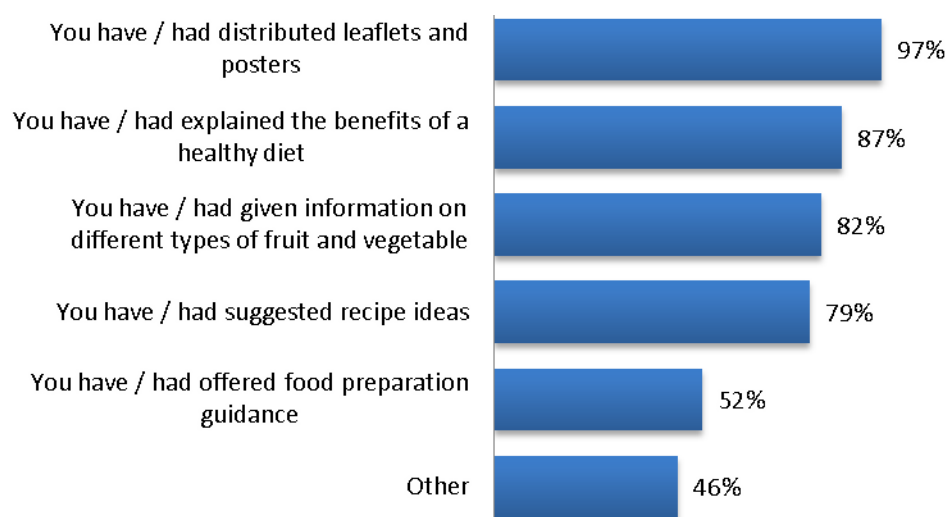
5.8 Sustaining co-ops - volunteer role

Volunteers have a key role in sustaining community food co-ops, as they are the ‘frontline’ of delivery, and act as the key liaison between both the supplier and the customers. The extent to which they are able to engage with their customers is clearly influential in customers’ continued involvement in the project.

The volunteers were asked if they had done anything to encourage their customers to continue with the scheme. Almost all of the respondents (97%) said that they had distributed leaflets and posters. Just under nine in ten respondents (87%) said that they had explained the benefits of a healthy diet to their customers, whilst just over four in five (82%) said they had given information on different types of fruit and vegetable.

Close to four in five (79%) had suggested recipe ideas, and around half (52%) said they had offered food preparation guidance. Other activities (reported by 46% of respondents) included a variety of responses range from food tasting and cooking demonstrations to printing and distribution of newsletters, or operating voucher and discount schemes. Respondents from co-ops based in schools also reported promoting the scheme via schools’ communication systems (for example, letters home, texts) and encouraging children to tell their parents.

Figure 12 Volunteers’ efforts to encourage customers to continue with the scheme (valid responses only)



Base: All respondents (156)

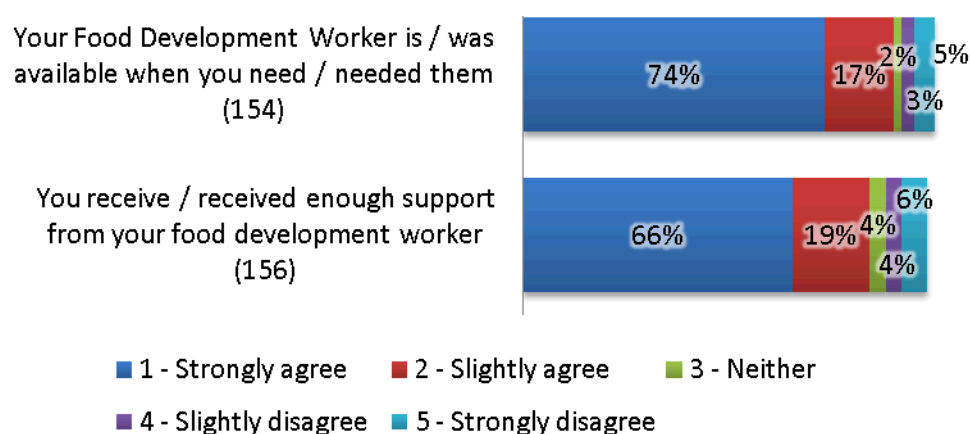
From the case study work, one of the issues that emerged in terms of ensuring that the co-ops were sustained was access to a suitable venue. There were several examples of venues having to change (typically because the host venue no longer offered use of the

room for free to co-ops but requested a hire cost). Moving to another venue often meant a fall in volunteers and customers and much work was required to bring the numbers back up again.

5.9 Supporting volunteers

In terms of Food Development Worker (FDW) support, 91% of the sample agreed that their FDW was available when the volunteer required them. Similarly, 85% agreed that they had received enough support from their FDW.

Figure 13 Food development worker support (valid responses only)



Sample base in parenthesis

5.10 Suggestions and recommendations from volunteers

The volunteers were asked (in the form of an open-ended response question in the volunteer survey) if they had any suggestions or recommendations for the scheme. Just under half of respondents identified some areas for improvement. There was a wide range of suggestions, covering several key themes:

- advertising and marketing of the scheme;
- improving the variety and choice of the bag contents; and
- offering additional services.

5.10.1 Advertising and marketing of the scheme

Firstly, many volunteers thought the scheme could be more greatly publicised and that action could be taken to raise awareness of the project:

"I just wish that it was more publicised and I do not think they do enough to raise awareness in local schools and local community."

"I guess having Welsh Government to raise awareness of the co-op scheme to the local authority education officers."

Some suggested opportunities for advertising, recommending a variety of channels, including word of mouth from volunteers who might already have been involved:

“More advertising done on local newspaper, TV and local radio.”

“More funding for leaflets and posters.”

“Perhaps to advertise and advise other groups to set up their own co-op.”

5.10.2 Improving variety and choice

There were also a notable amount of mentions for improving the variety and choice of the bag contents, and for ‘customers to have more choice on what fruit and veg they can have’:

“More variety of produce, or have the opportunity to choose what they want in their bags.”

Some respondents also advised that they would like to be able to offer smaller bags of fruit and vegetables, as a full bag was too much for some customers (this is already offered in some community food co-ops):

“Another thing was elderly people had to have full bags, which they could not finish in a week. So half of it would have been better.”

A minority also mentioned improving the quality of produce, or ‘just to keep the quality of the produce high’.

5.10.3 Offering additional services

Many respondents suggested services they would like to offer customers. Firstly, some respondents suggested offering educational services in addition to selling fruit and vegetables, for example providing ‘cooking sessions’ or publications with recipe ideas:

Introducing some more recipe ideas, perhaps doing an actual display, where the parents can come and see them. Also explaining nutritional values and calorie counts.

“The only thing would be more literature centrally, such as recipes shared between the co-ops, even if it was internet based.”

Other respondents stated that they would like to offer a delivery service to customers’ homes.

6 The Community Food Co-operative Customers' Perspective

Key points:

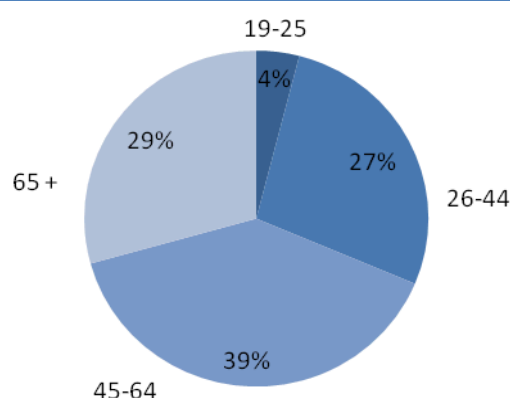
- A short self-completion postal survey was distributed to 39 larger community food co-ops (with 20+ customers a week) in July and August (excluding) and 266 customers returned completed questionnaires (covering 39 schemes, across, all regions).
- Most community food co-op customers are female (four fifths) and are either working full time or retired (around two fifths in each case).
- Customers identified a range of motivations for using community food co-ops, with supporting local communities and providing access to cheap fresh fruit and vegetables being the main motivations for most customers.
- The fact that produce is sourced from local businesses and farmers were also important reasons for customers using the community food co-ops.
- Most customers (four fifths) said that they eat more healthily since using the community food co-op and three quarters say that their families also eat more healthily.
- Buying produce from the community food co-ops has resulted in two thirds of customers cooking more meals for scratch.
- Customer loyalty is high - virtually all respondents reported that they would use the community food co-op again.
- Poor quality produce was cited as the main reason that could lead to customers removing their custom from community food co-ops. However, volunteer perceptions about reasons why customers stop using food co-ops centred on personal reasons such as moving out of the area and poor health rather than anything directly linked to the community food co-ops themselves.

This section of the report provides the experiences and views of customers who purchase the fruit and vegetable bags from the co-ops. It draws primarily on a postal survey of customers, along with qualitative data from the case study work. A sample was selected of larger community food co-ops with a customer base of around 20 per week or more, and 266 customers from 39 co-ops returned self-completion questionnaires, which provided a snapshot of the customer profile across Wales. A copy of the questionnaire is provided at Annex B.

6.1 Profile of the customers

Four fifths of the customer respondents are female (81%). Most of the customers tended to be age 45 or older. Only 4% were aged between 19 and 25, with 27% being between the ages of 26 and 44. Two fifths (39%) said that they were between 45 and 64. The remaining 29% were 65 or over.

Figure 14 Age of customers

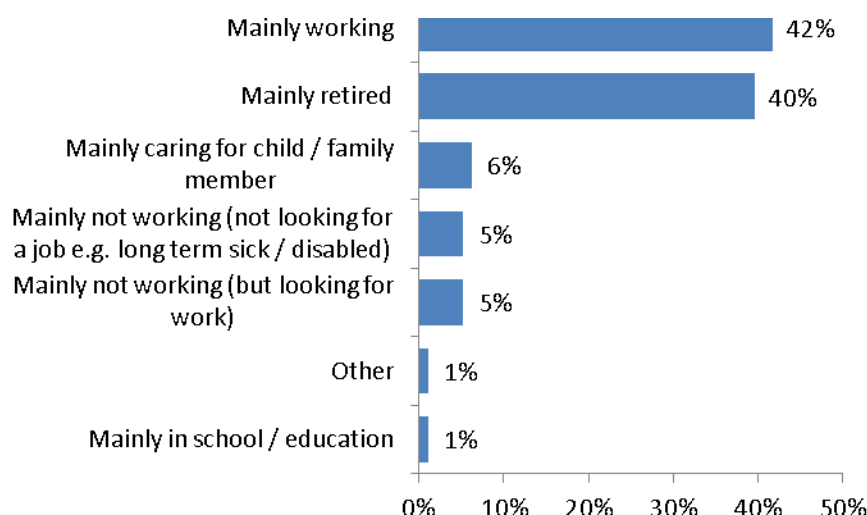


Base: All respondents (266)

Most of the customers said that there are no children living with them (70%) which reflects the older demographic profile. Sixteen per cent said that they live with one child and 13% said that they live with 2-3 children. A minority of 2% said that there are four or more children living in their household. Just over a quarter of the customer sample (28%) said that they had a disability.

Most of the customers were either working in a full-time job (42%) or retired (40%).

Figure 15 Main activities of the customers



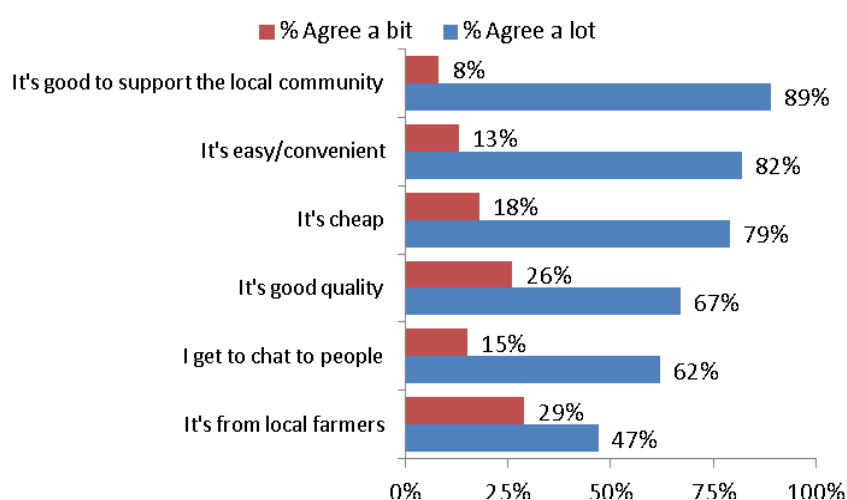
Base: All respondents (266)

6.2 Customer motivations

It is useful to explore the customers' motivations for purchasing fruit and veg bags. Figure 16 shows that there are many strong motivational factors that prompt custom. Nearly all of the customers agreed that they buy bags because it's good to support the community (98%), it's cheap (98%), it's easy/convenient (97%), it's fresh (97%) and it's good quality (95%).

Smaller, yet sizeable proportions also agreed that they buy bags because the produce is from local farmers (81%) and they get to chat to people (79%).

Figure 16 “I buy fruit and veg bags from this co-op because...”



Base: All respondents (266)

From this list, customers were asked to identify the main two things that motivate them to buy the bags. The top three motivations were; for supporting the local community (44%), cheapness (39%) and freshness (30%).

Some respondents also cited other reasons for purchasing the bags, and these included a variety of comments including:

“Because it gets me out of the house.”

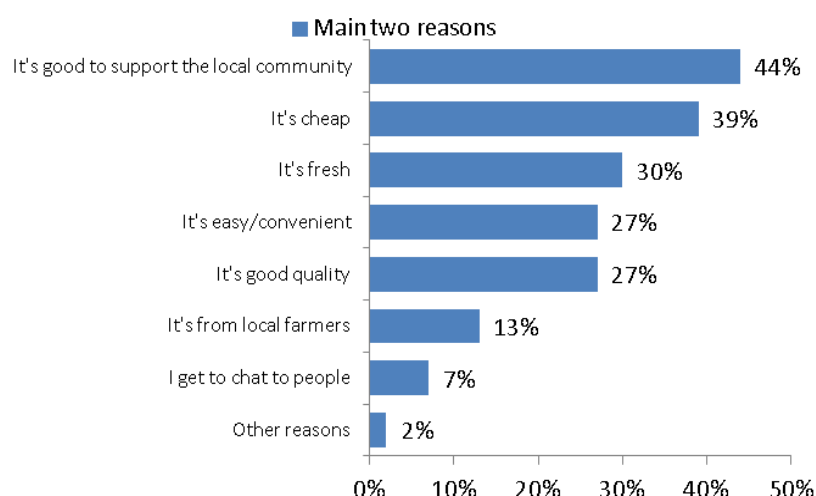
“It encourages me to eat more fruit and veg.”

“Less packaging.”

“The kids love it. It saves me 20 pounds per week off my weekly shopping. My grandmother enjoys the variety of the fruit bags.”

“Small amounts as I have recently been widowed and live mainly on my own. I regularly buy small amounts with variety.”

Figure 17 Main two reasons why customers purchase bags



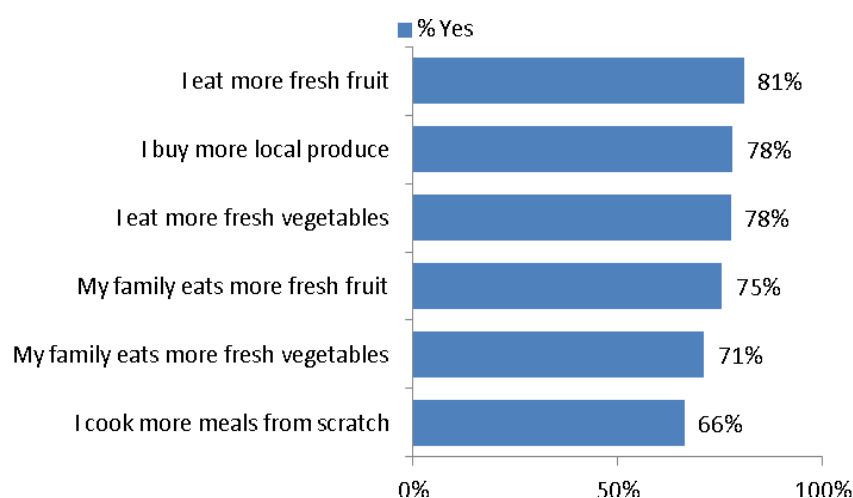
Base: All respondents (266)

6.3 Customer experiences

The customers themselves were asked to describe how the community food co-op scheme had benefited or impacted on them (see Figure 18). Four in five agreed that as a result of purchasing fruit and vegetable bags from the co-op they were eating more fresh fruit and vegetables (81% and 78% respectively). High proportions of customers also reported that they buy more local produce as a result of joining the co-op (78%).

Benefits beyond the 'purchasing' individual were also apparent. Three quarters of the customers said that their family eats more fresh fruit and fresh vegetables (75% and 71% respectively). Two thirds of customers (66%) said that they now cook more meals from scratch.

Figure 18 Customer outcomes since using the co-op



These positive outcomes were also captured at the end of the customer questionnaire where they were asked to provide any further comment or suggestions for improvements. Again, the comments collected were largely positive. Examples included:

"I have found that I have met people that I have not met before and the volunteers are very friendly."

"We eat more omelettes and salads, plus the children eat more of their five a day than they need to have."

"My two young children eat lots of fruit so it's handy to be able to pick up fruit which is good quality and value."

"I like the seasonal variations. The cherries and grapes are lovely, keep it up."

"We have (as a family) always tried to eat a large amount of fresh fruit and veg in our diet. Also I have always produced home cooked meals. However, this service helps reduce the cost and is convenient and worthwhile."

"It gives the less well off a good chance to eat healthily at a reasonable price."

6.4 Customer loyalty

As stated earlier, among the 266 customers who responded to the survey, virtually all of them (99%) said that they were either very likely or quite likely to continue buying produce from their community food co-op in the future.

The customers were asked to elaborate on their responses to this question through an open-ended question.

Many positive comments were provided and they generally covered convenience, cost, quality, freshness and access:

"It's fresh and very convenient, and always a warm welcome when you go."

"It's very convenient as you don't have to carry it from the shops."

"The value and amount is what I can afford. It's much cheaper than the [xx local shop] shop."

"They are very friendly. It's convenient and can plan meals to suit contents of bags. There is less waste and money is saved on shopping."

"I am quite happy with the quality and the convenience of only having to carry things a few yards home."

"Freshness, cheap, and good for the community."

There were very few negative comments that were collected; these tended to be around quality:

"Fruit sometimes goes off before we can use it."

“Sometimes it's not fresh as it should be.”

6.5 Reasons for leaving the co-ops – volunteers’ perspective

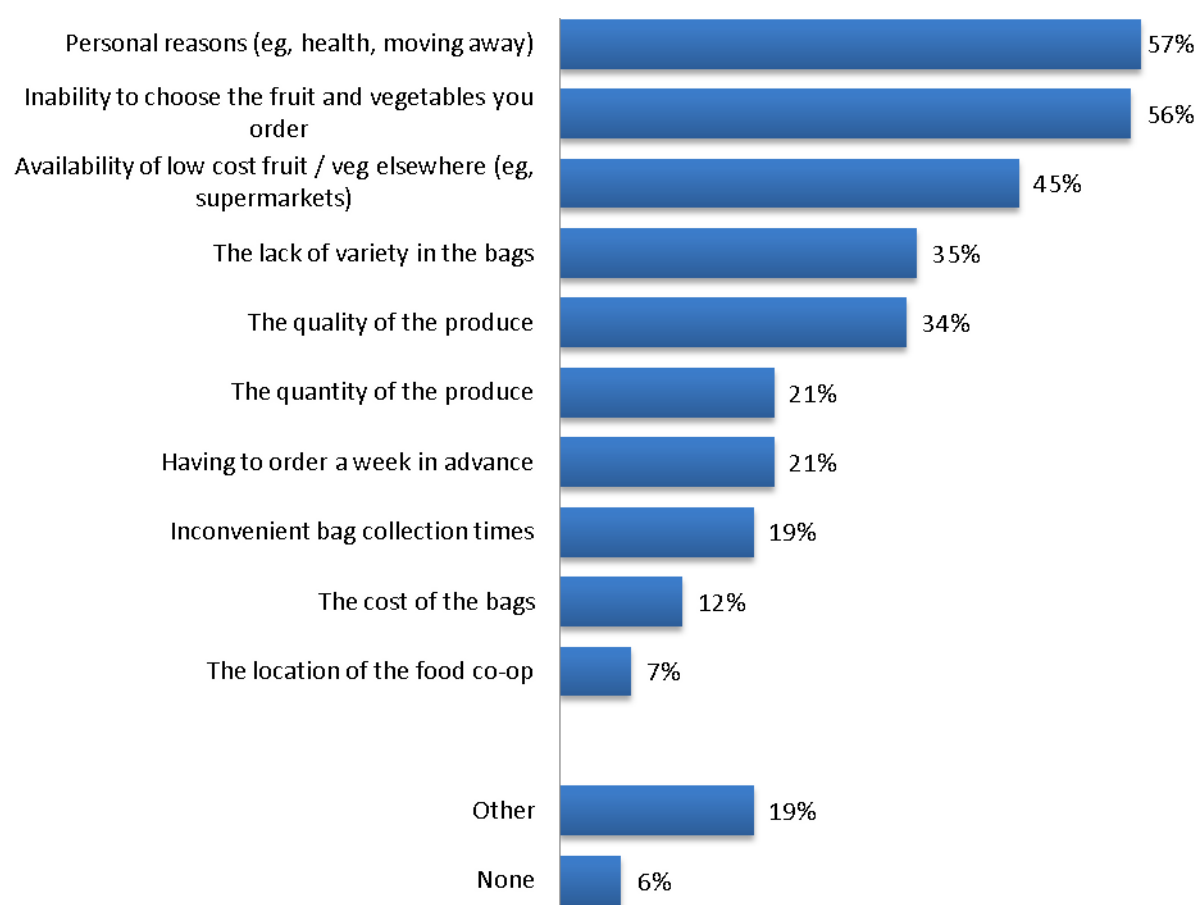
Bag purchasing patterns do vary across community food co-ops – some may have a regular and relatively large number of purchases per week, whilst others are smaller and have a greater variation in terms of sales. In some cases, this is accounted for by the time of year (for example, schools based community food co-operatives not running during school holidays), in others it may be related to changes in supplier or gaps in volunteer engagement or difficulties with the venue itself. On occasions, it may be the customers themselves who, for whatever reason, no longer purchase the bags. Understanding these reasons is important when considering sustainability.

As it was not possible to consult with past customers in this evaluation, the volunteers were asked during their telephone interview to suggest reasons why customers may have stopped purchasing bags from the community food co-op.

The top two reasons volunteers gave for customers leaving were personal reasons, for example, moving away or health issues (57%) and the inability to choose the items ordered (56%). Smaller proportions of 45% and 35% cited the availability of low cost fruit and/or vegetables elsewhere and the lack of variety in the bags as reasons for customers leaving the scheme respectively.

Nineteen percent of the sample stated other reasons, and these included a range of factors. Examples of which included bad weather, lack of volunteers and issues with the usage of the community food co-op site, for example, organisations charging for use of community halls.

Figure 19 Reasons for customer leaving the co-ops

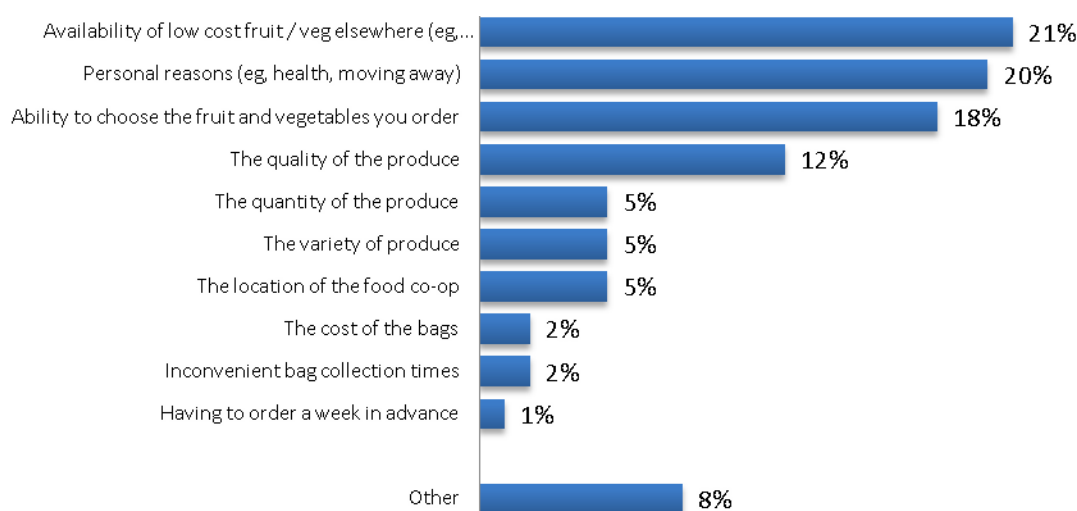


Base: All respondents (113)

When volunteers were asked what the *main* reason for customer leaving the scheme was, 21% indicated that it was due to the availability of low cost fruit and vegetables elsewhere. A further fifth (20%) said that the main reason was because of personal reasons, for example, health issues or moving away. Eight percent of the sample cited other reasons for customers leaving the community food co-op which again included factors such as the weather, lack of volunteers and issues with usage of the community food co-op.

Volunteers were generally, therefore, of the view that where customers no longer used the community food co-ops, this was related to: availability of low cost items elsewhere; not being able to select the items themselves; personal reasons; and, to a lesser degree, quality. In volunteers' opinion, reasons were far less likely to be related to quantity, variety or access to the community food co-op. Taking into account local alternative availability, along with customer choice in selecting the items themselves is clearly a consideration. For the former, it is related to mapping existing provision when considering site location and sustainability, whereas for the latter it is more likely related to customer expectations.

Figure 20 The main reason for customers leaving the co-op



Base: All respondents (113)

6.6 Suggestions for improvements

The customers were asked if they had any suggestions for improving the community food co-op scheme. Most of the customers appeared satisfied and did not offer suggestions for improvement, but of those that did many reported the lack of advertising and/or marketing activity:

"It's not widely advertised enough. They need to do a mail shot. I found it by accident."

"I'm surprised more people do not make use of it. More advertising might help."

"In order to increase customers then it needs to be more organised and marketed better."

"More people should know about it."

"There should be more of them and more publicity about them, as I do not think everyone knows about them"

"There needs to be better advertisement for what is on offer from the community."

There were also some suggestions concerning the amount of produce in the bags:

"A suggestion. Could anything be arranged for 'one person' rather than a full bag?"

"Smaller bags for the OAPs."

"Cater more for people living alone."

"I live alone and don't have a family to eat with."

7 The Community Food Co-operative suppliers

Key points:

- As of mid-2011, 75 direct suppliers have been involved in the food co-op programme, and 41 of these were interviewed (including two who are no longer part of the programme).
- The suppliers vary in size from very large organisations with annual turnovers into the millions of pounds to smaller, independent suppliers receiving revenue of around £30K annually.
- Suppliers found out about the programme from a range of sources including through the Rural Regeneration Unit's Welsh Produce Manager, co-op volunteers contacting suppliers Communities First co-ordinators and word-of-mouth from other suppliers.
- Most suppliers advised that working with co-ops was only a very small element of their trade, typically through supplying between one and five co-ops. Only a few said that it represented over 10 per cent of their business, supplying 10 or more co-ops. However for a minority of suppliers the food co-ops represented a significant proportion of their business.
- The types of produce supplied to co-ops varied depending on the price and availability of produce that was available with suppliers stating that they have aimed to provide best value.
- All of the suppliers sourced a proportion of their produce from third party suppliers, and around a third of suppliers also produced their own fruit and vegetables.
- Suppliers reported that the proportion of produce that is sourced from Wales tends to be very low since there is a limited range of produce grown in Wales, particularly fruit.
- Suppliers can manage demand from the co-ops, and suggested that more customers would be a distinct advantage.

This section reviews the role of suppliers in the programme, with evidence mainly being derived from depth telephone interviews with existing and past suppliers, focussing on suppliers of fruit and vegetables only. It also includes findings from discussions with Food Development Workers and Manager, and the Welsh Produce Manager.

7.1 Background

A key element of the community food co-ops is that suppliers are local, identified by the Welsh Produce Manager. The Food Development Workers (FDWs) link the local volunteers to a local supplier and the volunteer then agrees the payment and delivery system (that is, the price and size of bags and date/time and venue for delivery), with the support of the Food Development Worker). The latest figures (as of mid-2011) indicate that there are 75 direct suppliers to the community food co-ops. The breakdown of these

into different types and the number of co-ops they supplied is provided in the following table, along with the number who were interviewed as part of the evaluation (see Section 7.2).

Table 1 Food co-op suppliers and respondents

	Direct suppliers	Approximate number of co-ops supplied*	<i>Number Interviewed</i>
Growers	12	105	10
Wholesalers	26	133	15
Retailers	32	62	16
Social enterprise	1	1	0
Fish	1	1	0
Meat	1	1	0
Bread	1	1	0
Wholefood	1	1	0
TOTAL	75	1	41

*calculated by the Welsh Produce Manager, based on data from Ongoing Support Forms, January 2011.

Retailers often supply just one local community food co-op. Often they have to do this at wholesale quantity and price which makes it more difficult for the supplier to make an acceptable profit margin – but as indicated later in the report many remain happy to continue for reasons other than profit maximisation.

The suppliers vary in size, with two growers in particular supplying a relatively large number of co-ops.

7.2 Supplier profile

Overall, 41 suppliers have been interviewed. Two of these were no longer a part of the scheme. The sample of 41 covers all regions across Wales. The suppliers vary in size from very large organisations with annual turnovers into the millions of pounds to smaller, independent suppliers receiving revenue of around £30K annually.

7.3 Involvement in the co-op

The length of time that suppliers have been involved in the community food co-op varied greatly from those who have been involved in the programme since its inception six years ago through to those who have become involved in the past year, therefore suppliers had a range of experiences to report detailing their activities and involvement in the programme.

Suppliers initially found out about the programme through a variety of methods. In the main, most long-term suppliers (those in operation for around three to six years) first heard about through being directly contacted by a member of the community food co-op programme team. Producers that have become involved with the programme more recently had mainly found out about the programme by being contacted by volunteers from a community food co-op. This would appear to be a positive indication that volunteers have been supported in undertaking a leading role in selecting their own food producers. Other ways that producers found out about community food co-ops included; being advised by Communities First co-ordinators about the programme, responding to publicity in the press, and finding out by word-of-mouth from other suppliers.

When suppliers were asked what their motivations were for getting involved in the programme, most reported that they felt that it was a good business opportunity that was worth exploring, and that they were generally receptive to trying out new avenues for income.

We saw the potential for extra trade – we have to take what we can get - the supermarkets won't be happy until they have it all, so we have to diversify as much as we can.

It looked like extra business so we thought we would give it a go.

It would increase turnover – we thought we might as well have a go as it was in the same delivery round anyway.

It looked like a simple scheme that could give us a reasonable return and provide the co-op with good quality at a good price especially our own produce.

It is also encouraging to report that a lot of suppliers said that participating in an activity that supported community based activity also played a significant part in their decision to participate in the programme.

“Well it was for the local school and we are very rural here so I am happy to help.”

“I liked the idea of being able to supply deprived areas and the people running the scheme sold it to me very well.”

Some suppliers advised that although the financial rewards would not be great, but they thought that it was important to support local communities, particularly school based communities. Additionally, some advised that they felt that supplying fruit and vegetables to target communities would help to encourage more people to eat healthily.

“Financially it wasn't too attractive but I'm happy to support the local school as a community service.”

“It seemed a good idea, and possibly sell a bit more, but it was more to do with my old school and it was nice to go back and work with them and the people running the scheme are very nice. It's a good bit of social interaction.”

“Weighing it up, it made business sense, and when you meet the people you are selling your stuff to directly, so you also get a lot pleasure out of it; their enthusiasm and appreciation, you want to please them. Obviously you have to make money as well, but rolling up with your own stuff and getting appreciated. You get a lot of pleasure out of it as well, it makes want to keep on with it.”

7.4 The Role of the Food Development Workers

Food Development Workers' (FDW) contact with suppliers has reduced over time, in line with the programme's aim to ensure that co-ops are empowered to be self sustaining through volunteers taking responsibility for supplier liaison and negotiation. The workers advised that they provided volunteers with information and samples of produce from typically around three suppliers so that they can choose the supplier that best suits their needs. This approach was felt by FDWs to be working well in ensuring that volunteers have a good sense of ownership of their co-op and are able to build up a good relationship with suppliers from the outset in establishing good communications and dialogue about the produce.

Most suppliers reported that they had limited contact with FDWs, although some advised that they had more contact with them in the earlier stages of the programme. However, all suppliers had regular contact with, and updates from, the RRU's Welsh Produce Manager. Some still had frequent contact with FDWs, and felt that this was appropriate.

However, generally FDWs advised that their contact with suppliers had reduced over time and that they have sought to encourage volunteers to undertake a proactive role in contacting suppliers where there have been issues or problems that need addressing.

7.5 Amount and type of produce supplied to co-ops

Most suppliers advised that working with community food co-ops was only a very small element of their trade, typically through supplying between one and five co-ops. Only a few said that it represented over 10 per cent of their business, supplying 10 or more community food co-ops. However, a few of these larger suppliers work with over 50 co-ops.

The types of produce supplied to community food co-ops varied depending on the price and availability of produce that was available in either wholesale or what was being grown at that time. Suppliers advised that they sought to provide the best value that they could, but this could mean there was a lot of variation in what is delivered each week.

"We provide a £3 fruit box and a £3 veg box. Both contain what I have as best quality and value. Either could be from local growers wholesalers or from the farm gate."

"We buy potatoes locally and we grow swedes cabbages and cauliflowers, and then later leeks parsnips and carrots. If we are unable to supply at any time I can source from other farms. We try to supply bags for £3 but they can also ask for eggs and we also grow beetroot so if they want extra we can take the value up to £5."

"We had a leaflet telling us all about it what we should supply and the 2 seasonal items of our choice depending on price availability and quality. So I go for what I think is good value. No problems with anything really."

"They ring us when they want something and how much they have to spend - we give them as good a value as we can. We do have to be flexible though and usually they get a bit more."

7.6 The supply process

All of the suppliers sourced a proportion of their produce from third party suppliers, either from wholesale markets or from farmers. Around a quarter of suppliers also produced their own fruit and vegetables. Suppliers sourced their produce from a range of suppliers, including wholesale markets in Wales and England. Suppliers advised that some wholesale

markets based in England are closer to them rather than sourcing from Welsh wholesalers, for example in Evesham and Cheshire, so it makes more economic and environmental sense to source from these suppliers.

Suppliers were asked to estimate the proportion of produce that is sourced from Wales. Most advised that the proportion tends to be very low since there is a limited range of produce grown in Wales, particularly fruit. Additionally, most suppliers advised that they are constrained by costs when supplying to co-ops so have to select the best value produce that is available.

"Would like to do more local veg but there we would have more problems with the quality. We go for the best we can at the best price and that unfortunately is not usually local produce."

"Not too much local - vast majority is foreign. The UK season is very short but usually spuds and carrots in season."

"Over the year probably only about 5% will be Welsh - not a lot of fruit in Wales and we are closer to the Wirral here than we are to Newport."

"Swede and cauliflowers we can grow in Wales but the rest I have to get from wherever I can."

"I might put strawberries and/or rhubarb in but that's about it - very little fruit at this time is grown in the UK. Maybe cherries but they are expensive. The veg? well 90% is relatively local or farm grown but that can come down to say 10% probably just potatoes at certain times in the year. Springtime you have got imported carrots parsnips at certain times when not cropping here it comes down to the basics for a couple of months."

Nevertheless, many producers advised that they try to source Welsh produce where they can, as well as using local suppliers when they are located close to the border with England.

"Local availability varies. We source locally as much as possible but at this time it will only really be potatoes and swedes. Give it a couple of weeks or so and it will nearly all be local when the back garden growers put their surplus on the market."

"I try to keep it as local as I can but it does depend on the season - most times it's between 50 and 60%."

"Pretty nearly all the veg comes from local sources - all I would say is Welsh but the fruit now that's different - it has to come in from abroad mostly."

"All veg [is produced locally] when it's in season nothing more than 40 miles away. Welsh? Very few Welsh suppliers around here. We are trying to redress that in our own way but through the year 20 or 25% and next year in season we are hoping to improve on that."

7.7 Receiving and fulfilling orders

All suppliers advised that they have established processes with the community food co-ops to receive and process orders. Most community food co-ops telephone suppliers with their orders, with some e-mailing their orders through. Suppliers reported that the process generally works well and that they have established good communication processes with individual community food co-ops. The timing of order placements was generally felt to be appropriate in enabling suppliers to source produce at the price required.

7.8 Quality issues

Ensuring that produce is of a good quality is a central concern to all suppliers. Nevertheless, suppliers did emphasise that they are dealing with perishable goods and as such, there are occasions when quality can deteriorate whilst produce is in transit.

“Fruit and vegetables are perishables and pretty fragile generally so you don’t have a lot to play with in the time factor and stuff can easily get bruised.”

Some suppliers reported teething problems at the outset, often in connection with storage facilities or as a result of differences in expectations, but stated that these had been dealt with swiftly.

“There was an issue early on with delivery days – a co-op wanted a delivery on the Wednesday to suit the volunteers but of course by the time their customer wanted to use it at the weekend it was not as fresh as it might have been. We sorted it out though, and ordered and delivered later in the week.”

“Sometimes it’s how the co-ops handle the stuff...if they put them [produce] in a warm room by a radiator or something it’s not helpful.”

“Now and again there might be the odd orange in a box...but it is fresh fruit and whilst a shopkeeper might accept that sort of thing for the householder only buying a few it is a bigger part of the order – we make sure it doesn’t happen often.”

“Dirty potatoes are say, £3 a bag cheaper than the washed ones – so that means there is £3 more to put in the bag but they sometimes want clean ones, and you will get a complaint about that – that sort of thing.”

7.9 Meeting demand and seasonality

Suppliers all agreed that they can manage demand from the community food co-ops, in fact many suggested that more customers would be a distinct advantage; potentially increasing the tight operating margins which many suppliers appear to operate on. Notably, some suppliers (including those who may be more used to operating on retail margin levels) reported that their involvement in the scheme was at times at their own financial cost.

“There is not a lot wrong that more customers wouldn’t put right.”

“I am probably making a loss but it could work well if the quantity [of customers] was there.”

“I don’t make anything from it, especially if you include fuel and time, I probably lose out.”

“The margins are not good.”

With regards to seasonality and managing through the hungry gap, suppliers all experience a reduction in the availability of produce in the winter months. The hungry gap is widely accepted to occur between the months of April and June when the variety of produce declines as the winter growing season comes to an end and prior to the maturity and harvest of spring and summer crops.

In practical terms, suppliers find it more difficult to source good quality crops at reasonable prices during these months; produce is available but it is often imported:

“Fewer items available especially when something like a heavy frost can affect the prices.....you can buy anything all year round if you want to pay for it – it’s about the value.”

“It was always difficult to make it look good all the time so yes, it could be a bit of a problem – I didn’t want to just keep putting all the same stuff in all the time, but sometimes it couldn’t be helped.”

“Makes a difference to the price...and on what I can get to put in. It can make a difference to what I can get locally.”

7.10 What works well

For those who have been suppliers for a couple of years, the scheme is generally considered to be working well, servicing their own companies by adding to cash flow and turnover, especially in quieter times.

“The cash on delivery aspect is a good thing for us – very useful for the cash flow.”

“Helps cash flow in the quieter times.”

Those who have relationships with schools consider that the relationships have supplementary benefits for children, in terms of synergies with the curriculum, for example explaining healthy eating, raising awareness of local food supplies and growers. In fact some comment that further linkages with the school and children would be beneficial, for example, teaching the children how to grow some of the foods.

In a similar vein, suppliers report that contracts with schools work especially well when the teachers are enthusiastic and committed and in turn encourage pupil/parent engagement.

“It depends on the teachers if they are enthusiastic then the kids follow.”

It is also clear from responses that supplier visibility has been heightened as a result of involvement with the scheme, and as such some suppliers benefit from extra custom from buyers, whilst others provide a route to market for other producers.

“We get some of the clients ring us or come in and ask for some special extras in the bag – which they will pay for – and they also tend to use us when they come into town so we do get some extra custom through it.”

“It gave me the impetus to start selling from the shop and that is picking up very well and it is providing a route for people with surplus product to get it to the public.”

The nature of the relationship, understanding and trust were all identified by suppliers to be key aspects to a successful supplier-customer relationship.

“Generally everything ticks along nicely, our system seems to work well....it is a very good relationship based on trust between us and the co-ops – it couldn’t work without it.”

“The relationship with many of the organisers is very good. They realise we have to make a living and I hope we understand the problems they might have in giving their people what they want regarding variety and quality.”

7.11 Areas for development

Respondents highlighted several areas of the scheme that were in need of development or modification. Issues identified spanned the entire supply chain.

The most frequently identified issue concerned 'drops in demand', the implications of this and the most frequent causes. In dealing with schools, suppliers are faced with a supply demand which peaks at certain times of the year and drops off totally during school holidays – this in itself creates supply side issues in terms of revenue and delivery management but it is expected by suppliers and can be managed to an extent. However, several suppliers noted that demand often drops with schemes once the novelty of the community food co-op wears off.

"The schools are not that successful they are not operating for about a quarter of the year so people can't use the coop, especially at the times when they might want extra veg – Easter or Christmas."

"It is when the novelty wears off that the scheme becomes tested."

"It can start off well enough but it dies down, we had 2 schools and they dropped out and we are now on our third....the parents asked me what happened, but it just stopped."

"The demand dropped, we were doing well enough to start with probably around 70 orders a week but some of those running it lost interest."

This loss of interest or commitment from end users is thus also evident among the volunteers or schools staff involved as the realities of running the scheme and the demands on their time become apparent.

"Sometimes there is a variation of commitment from different volunteers at different times."

"The teachers didn't really want to be involved it can take up too much of their time."

Overall, these fluctuations in demand and fluidity of volunteer contributions mean that achieving scheme longevity can be particularly difficult for suppliers. Achieving year round consistent supply was felt by several suppliers to be an area for development which would be beneficial to the business.

The knock on effect of the market conditions, combined with the focus on value for money and variety means that suppliers reported difficulties with achieving economies of scale, and recognised that there are times when it is difficult to offer a range of produce within the price of the bags, something which could be developed and improved should numbers increase.

"It could work if the numbers added up – if it was 50 or 60 co-ops then maybe it would become more efficient. It would also be better if it was part of a regular round, and for me if it was permanent then it would take on a different aspect."

"The only stumbling block is how hard it is sometimes to provide the value and the variety for £3."

"It got tougher to supply for £2.50 – harder to make it look good value."

Suppliers also pointed out that potentially more could be done to educate customers and the general public in order to raise awareness and understanding and modify people's expectations when comparing local suppliers to mass market retailers.

"Sometimes [customers] expect more for the price than is reasonable...there needs to be an understanding of what can be done and that what they get would probably cost almost double in the supermarket."

“Trying to convince the users of price sensitivity of seasonal produce.”

“What can you put in for £3 – what can you get at the supermarket for £3”

7.12 Impact and sustainability

7.12.1 Impact on supplier

As indicated earlier in this section of the report, the economic impact of participation in the scheme was felt to be limited by the majority of suppliers (remembering that the majority of suppliers are in fact retailers so are used to higher margins on their sales). Nevertheless, there were tangible impacts that suppliers identified, including increased awareness of their business, raising standards and improving internal business operations, providing alternatives routes to markets and customers for produce that would not be accepted by other retail channels.

“It gives us some identity...puts our name out there bit more you see.”

“I think it has helped improve our efficiency, we realise that we need to fill the van each time we deliver – things like that. We may not waste a lot but we don’t waste anything and we can use up the perfectly sound produce that would not be accepted by the retail outlets – bent carrots that sort of thing.”

“It is good knowing that it helps some people who can’t get out....word gets around and it helps to be well thought of.”

“It has in all honesty been a help to us and it also helps the people we buy off and its nice to put something back into the community, so a win-win all round.”

Others commented that their participation in supplying community food co-ops is viewed as more of a service, than a business venture within the orthodox sense of business being about profit maximisation.

“We don’t mind doing this as a service really.”

“A hassle with little return but if it helps the school it’s all part of the service.”

“Not really worth doing, but I don’t want to stop – it is keeping some people happy.”

“It is more of a service than a profit maker.”

However, others felt that the overall impact of involvement on their business was negligent, or even slightly loss making. Despite this, most planned to continue and hoped for increased demand.

“Very little [impact] but it helps a bit.”

“Very low to zero [impact].”

“I lost on it so packed it in.”

7.12.2 Wider impacts

Respondents were asked two questions with regards to the wider impacts of the scheme. Firstly, whether they thought the scheme had a role to play in helping communities to eat healthier? Secondly, whether the scheme had a role to play in supporting a local food industry and economy? Responses were varied in respect of both questions. A popular view

amongst respondents was that the scheme assists communities to eat healthier, and does so by introducing more people to fresh food, engaging with customers who would not have otherwise purchased or consumed the food offered in the bags.

“It does help – I don’t think that many [people] would go out and buy what they get [in the bags].”

“Yes [it does have a role] especially if it encourages children to eat more fruit and vegetables.”

“To some degree yes, especially when local produce is linked to cooking the stuff – or learning how to cook it – gives knowledge of the difference ‘fresh’ makes.”

“Yes I think it can, it puts the food in front of people especially those who might have difficulty getting it for themselves.”

A handful of respondents were less convinced of the wider societal impact of the bags in promoting health eating, largely as a result of present volume levels and a recognition that people cannot be forced to change their behaviour or habits.

“I hope it does [have an impact on healthy eating] but you can’t force people to buy.”

“As it stands...just not enough [people] involved to make a difference.”

“It is hard to say what the effect is.”

With regards to supporting the local food industry and economy, several respondents recognised that theoretically this type of initiative should be of benefit, yet in practice several questioned the reality of this.

“Not at the present levels, but the potential is there.”

“Product awareness can be increased and this might help but the jury is out at the moment.”

“Not enough is locally grown.”

“It is not big enough to make too much difference and it is not consistent.”

“Not so much as local producers are not all that plentiful.”

“I don’t honestly think so, there is just not enough in it, and not enough is produced locally, or even in Wales.”

“Not enough is produced locally so it makes it difficult but you don’t get many grapes in Wales.”

Whilst, participation levels may well be something that can be developed and improved, the largest obstacle to contributing to the local food economy, according to respondents, is the volume of produce grown locally.

“If we can’t grow it locally then we can’t buy it locally.”

Without the supply and a continuation on the reliance of wholesalers, respondents were sceptical about the overall contribution the local economy.

7.13 Views on sustainability

Finally, respondents were asked to reflect on the sustainability of the programme as well as the role the programme would play in the future sustainability of their business.

With regards to the sustainability, several respondents reflected upon earlier comments that they had made in relation to the peaks and troughs in customer demand. A core of suppliers believed that on current levels the scheme was not sustainable. However, this view was tempered by an enthusiasm and belief that the general concept was good and with sufficient volumes and an increase in custom scheme longevity could be achieved.

“From the suppliers’ angle it needs numbers.”

“Potentially but it needs to grow. Having the schools is important as added value but the core has to be all year round.”

Respondents were clear that much more could be achieved if the scheme received further support from the Welsh Government to facilitate growth and expansion. Furthermore, respondents were keen to stress that the best examples of supplier/co-op relationships and success stories were where volunteers were committed and engaged. Additional comments from suppliers illustrates these points:

“[the future] Depends on the funding.”

“The idea is good but the budget is low.”

“Why not, with the right support from WAG.”

“I would like to think [it will keep going] but it needs the volunteers to keep it going.”

“I hope so, but it depends on the people.”

“What makes it successful is where you have a team of enthusiastic volunteers who want to make it work. The better ones are the actual community-led ones where there is a strong support and where one has an off day there is another who will back them up. Some will be more sustainable than others.”

A minority were more cautious in their assessments and suggested that, irrespective of internal assets and the willingness of staff and volunteers, external factors such as stiff competition from supermarkets meant that sustainability was questionable.

“I would like to think so [the scheme being sustainable] but the supermarkets have such immense power over suppliers that once a supplier is sucked into dealing with them they can’t do anything else, they really get no choice afterwards.”

“The supermarkets are killing the retail trade all over and the co-ops can’t stop that.”

With regards to suppliers’ own businesses and the role that the programme is likely to have on the sustainability of their business, the consensus of opinion was that the scheme was unlikely to play a role in future sustainability.

“No we will carry on with or without it.”

“Not losing but not gaining.”

“No, I would not depend on it as it stands.”

“Happy to be part of it, but probably not vital for the business.”

"It helps but no more than that as it stands."

7.14 Suppliers' recommendations for improving co-ops

Suppliers were asked to provide recommendations for improving co-ops, with most providing some ideas. Needless to say, those who provided suggestions advised about ways of increasing the number of co-ops and customers to make them more financially viable and sustainable. Some suppliers recommended that they should be able to offer a wider range of goods and produce to increase the customer base.

"Just increase the numbers - it could work well and I might also be able to tie it in with offering extras and keeping it in line with what people might want for a bit of extra cash - you know giving a wider range of good value delivered to the door."

"Quality and volume and price could all be better. It needs big numbers to make it worth doing."

"It ought to be possible to do say a mixed box for just under the price of 2 instead of a salad and a veg for £3 each, a mix for £5 say."

It was advised that there should be a greater focus on advertising to achieve greater numbers, and that this could be based on promoting educational messages about the health benefits of fruit and vegetable consumption. Additionally, it was recommended by suppliers that advertising and promotional activities should show the price differentials between co-op produce and supermarkets to emphasise how co-ops offer better value for money.

"It is easier and better value all round if the volume was greater say 10 or 12 [bags] of each."

"There needs to be a higher profile for fruit and veg generally - if people go into a supermarket and buy a bottle of milk they know how much it is - if they buy a loaf of bread they know how much it costs or even some of the higher profile fruit like a banana but not so much so for a swede or some onions and all those other little items that they pick up they don't have a clue what the cost is. This is where the supermarkets make their money - they discount the high profile stuff but you can pay a higher price for the smaller things. For example Purple sprouting broccoli was selling locally for about £2.50 per kilo or something but in a little tray in a supermarket the price worked out at something like £44 per kilo and yet people were paying it!"

Some cost comparison work has been undertaken in July 2010 by the Welsh Produce Manager at the RRU (see <http://www.ruralregeneration.org.uk>). Their calculations compared the average bag contents from five different suppliers with the comparable costs from three major supermarket suppliers. The analysis found that on average, bags with similar items and amounts cost £2 more per bag than if it was purchased from a food co-op. The calculations indicated that, assuming each customer buys two bags per week (one fruit, one vegetables) (over 52 weeks) from the food co-op rather than a supermarket, there would be an approximate saving of £242 per year. .

It was recommended that enhancing volunteer and customer awareness and knowledge of how fruit and vegetables are grown and seasonality would be beneficial so that there is a better awareness of why availability of different produce varies throughout the year.

"Maybe a little more could be done to educate some people to understand that at certain times stuff is in short supply and that seasons mean shortages - most people do understand

but some don't get it that they have had a bonus when it's a good time and even in the bad times it is better value than the supermarket."

Sharing good practice amongst existing suppliers was also recommended especially in terms of how to work with different types of co-ops and volunteers, for example sharing experiences of how to best work with schools and young people in ensuring that produce is handled correctly. It was felt that such activities would prevent known mistakes from being duplicated across areas. A few suppliers went one stage further, in recommending that suppliers should be accredited to ensure that produce is of good quality and stored correctly by co-ops.

"If suppliers have contracts with schools and hospitals and that they will have accreditation but anybody can supply the co-ops - there should be a proper accreditation to supply them."

8 Overview of outcomes

Key points:

- Over 4,420 customers are buying bags of fruit and/or vegetables from food co-ops each week.
- Volunteers, customers and their families are eating more fresh fruit and vegetables as a result of the food co-ops.
- Local community engagement and social interaction was increased through buying produce from the food co-ops, and from becoming involved as a volunteer.
- As well as supporting local activity, volunteers also reported benefits to themselves, including developing their employability skills.
- The programme has also enabled food co-ops to link in with other activities (such as healthy schools, education and social events) and has brought new activities and opportunities to community venues.
- Communities themselves benefited through increase sales of local produce and the introduction of new suppliers such as meat and fish.
- Schools-based co-ops in particular were supporting literacy, numeracy and enterprise skills among pupils.
- The food co-ops are generating over £918,000 of business each year, through the sale of over 6,801 bags on average each week. Although it was a small area of business for some suppliers, for others it was (or had the potential to become) much larger, and for a very small number formed a core part of their business.

This part of the report brings together the evidence to identify the outcomes, and longer-term impacts, of the food co-op programme on individuals, local communities and suppliers. Since the programme began in 2004, the Community Food Co-operative Programme has established itself across a wide area of Wales, with a visible presence in many communities, particularly in the south, north east and mid-east Wales but also towards the south west and north west. The longer-term viability of the approach is evident in the high number of community food co-ops which have been running for many years – once they become established they tend to remain established.

8.1 Individual-level outcomes

The community food co-ops have engaged with a large number of customers, with an average of 4,420 customers buying one or often two bags in a week.

Increases in fresh fruit and vegetable consumption

Four out of five individuals were eating more fresh fruit and vegetables than they were prior to buying produce from the co-op – this was evident from both the volunteers' observations as well directly from the customers themselves. This also extended to family members, with the majority stating that their family as a whole also now eats more fruit and vegetables.

Two thirds of customers also reported cooking more meals from scratch – perhaps helped by the inclusion of a bigger range of items in the bag than they might normally choose, plus recipe ideas which were often provided by the co-ops.

Financial savings for individuals and families

Financial savings were also reported among some of the customers (although other factors were as important, such as freshness and convenience). All of the customers who responded to the survey agreed that they were likely to continue to buy produce from their food co-op in the future. Research undertaken by the RRU directly indicates that families using a food co-op (purchasing two fruit and veg bags a week) can save around £242 each by buying from a food co-op rather than a supermarket (as well as supporting local businesses).

Greater community involvement

Customers were engaging in their local community which they were not doing prior to purchasing from the fruit and vegetable co-op – this was evident among both volunteers and customers. For volunteers, most of them had not been involved in other activities at the host venue until becoming involved in the community food co-ops. All volunteers reported positive impacts of their involvement, and all felt that they were contributing something of benefit to society as well helping people to eat more healthily. Improved social networks was also evident, with meeting new people cited as a personal benefit for almost all of the volunteers surveyed, and over half saying that being a volunteer had helped them to get out of the house more often. Meeting new people was also cited as a benefit among the customers.

Enhanced skills and employability

Increased confidence was also apparent among the large majority of volunteers, and over half also felt that they had developed skills and improved their CV.

8.2 Community-level outcomes

The community food co-ops are being run from a range of community and schools venues by teams of dedicated volunteers who give their time freely and regularly. Within schools, this extends to staff running co-ops in their lunch or break time and pupils of all different ages getting involved in the bagging up of produce and taking payments and orders.

Supporting the local community

The programme has enabled co-ops to link in with other activities running in the community, such as education events and social activities and new networks had been established. Community food co-ops have brought new activity to existing community venues (the majority are based in venues such as community centres, church or village halls).

Support for the local community increased, with almost all customers agreeing strongly that it was good to support the local community. There was also evidence to suggest that customers were buying more local produce outside of the co-op than they did previously, which is beneficial to the local community (for example from local meat and fish suppliers).

Supporting learning

For schools that have engaged in the community food co-ops, the benefits have been to encourage healthy eating among children (and their families) as well as the ability to use the

food co-op programme to support literacy and numeracy among the younger children (for example, via the bagging-up of produce and taking payments/orders). For older children, benefits were reported in terms of learning business-related aspects (monitoring sales and orders, for example).

8.3 Supplier outcomes

The programme has 75 direct suppliers which includes growers, wholesalers and local shops across Wales. The average number of bags sold per week is just under 6,800, providing approximately £20,400 of sales per week – or around £918,000 per year.

Supporting locally sourced produce

The evidence indicates that the community food co-ops do make some contribution to increasing local supply from Wales and England, albeit on a relatively small scale and variable depending on the time of year – suppliers estimated at anything between 10% and 90% of their produce was locally produced (typically defined as around 40 to 50 miles away). This is in line with UK production, where the climate prohibits the growth of much fruit and other produce. Around a third of suppliers also produced their own fruit and vegetables with the remainder sourcing their produce from a range of wholesale markets including Wales and England (depending on the location of the supplier), which included produce from both the UK and abroad (driven to an extent by seasonality as well as cost).

Profitability

Among suppliers, a primary reason for becoming involved in community food co-ops was a business one, to increase turnover and provide a reasonable return. Most suppliers supplied a relatively small number of co-ops – up to around five – so as a proportion of their business it remained relatively small as a proportion of their overall income except for a few cases, where supplying community food co-ops was a core area of supplier business.

Some suppliers reported little margin (to date) in supplying the community food co-ops but they were content to continue because they felt that it was beneficial to the community and they hoped that demand would increase. That said, the cash flow the community food co-ops generated (through customers paying ‘upfront’ for their bags, was of benefit as the purchase had been made before the grower or supplier had picked the produce, providing the supplier with an incredibly low risk mechanism for selling their produce). Some suppliers had found that additional business was generated through the co-ops by customers wanting extra produce (for example, eggs) or calling in to the suppliers’ shop when in town.

Satisfaction

An additional outcome for suppliers was a sense of satisfaction in being able to contribute something to the community and to support a local initiative through the provision of fresh fruit and vegetables – even among those who made little profit by being involved, it was something they were keen to continue because of the benefit they felt it was having on the community or on schools that they supplied. Demand was manageable, and there was evidence to indicate that suppliers wanted more customers.

9 Conclusions and Recommendations

The overall aim of the Community Food Co-operative Programme in Wales is to improve access to locally produced, fresh, affordable, high quality fruit and vegetables (and in some cases, other produce) to communities across Wales with a particular focus on areas of social deprivation. In conclusion, the evidence indicates that the Community food co-ops have successfully enhanced the provision of fresh fruit and vegetables to communities at a local level, providing good value, low-cost access to quality produce, sourced locally. However, the benefits of the Community food co-ops extend far beyond increasing access to and consumption of fruit and vegetables to raising the profile and capacity of the community, building social networks and cohesion, and increasing knowledge of healthy food as well as providing new opportunities to develop education and skills. This final section provides recommendations for the future programme going forward, both in terms of operational delivery and strategic direction.

9.1 The RRU Project Manager and Welsh Produce Manager roles

Both the RRU Manager and the Welsh Produce Manager play pivotal roles in the projects, providing liaison between the Welsh Government and its stakeholders and between suppliers and the Food Development Workers as well as a focus on the future direction of the programme. As such, their roles are both key in both strategic and operational terms and should continue. The ability and expertise of the Welsh Produce Manager to focus effort on identifying and engaging with suppliers, promoting the benefits of the programme and explaining supplier involvement as well as looking to expansion and diversification opportunities has meant that the RRU Manager can divert other time into managing the FDW element and developing the sustainability of the programme for the future.

9.2 The role of the Food Development Workers

The Food Development Workers clearly play a critical role in the set-up and early stages of the community food co-ops through visits, support and the transfer of knowledge – without this early support it is unlikely that the community food co-ops would be able to get established. A key function of the FDWs is in encouraging and identifying demand, linking in with the local community to identify a suitable venue and local volunteers who can commit to supporting the community food co-op, as well as supporting the volunteers in identifying and negotiating with suppliers. FDWs' attendance during the first few weeks was also important, to help volunteers to get 'on their feet', to build capacity (and in some cases, confidence) and to provide them with the information and advice they needed to get started. It is recommended that this early set-up support remains as without it there is a risk that volunteers will not have sufficient support or knowledge to establish or sustain community food co-ops or that they will require more help later should the food co-op run into difficulties or need assistance.

Almost all of the volunteers indicated that their FDW was available when they needed them, and that they did receive sufficient support. This suggests that in some cases there may be an over-reliance of volunteers on FDW help, support and advice at later stages in the absence of any alternative support. There is a need to ensure that the demand for FDW support is kept manageable and that their extensive knowledge, expertise and networking

capacity is maximised. Whilst FDWs may be happy to provide ad hoc advice and support, in order to manage work load and capacity whilst ensuring that capacity is developed, volunteers need to develop the skills and knowledge to run the co-ops themselves. Their roles, thus, may be better viewed as ‘start-up/support workers’ (akin perhaps to business start-up support).

It is recommended that alternative sources of support are made available to volunteers once their co-op is up and running. This should include both remote (such as online) and hard copy resources (such as the volunteer handbook currently under development) for those without internet access. It could also include a secure website (linked via the Rural Regeneration Unit) for volunteers which they are able to access (via a log-in) to put them into contact with volunteers in other schemes, to share good practice as well as to be able to retrieve information related to, for example, managing the bag scheme or working with local suppliers as well as more specific information tailored around, for example, what to do if there are difficulties with a venue, concerns over the quality of produce, falling numbers of customers or other frequently experienced problems. As part of the initial support from Food Development Workers, volunteers could receive a demonstration of the website and the advantages to volunteers of joining this ‘virtual community’. The evidence from the evaluation also indicates that personal support is also important to volunteers. Promoting a central helpline facility, via the Rural Regeneration Unit, would enable volunteers to discuss any issues or concerns (or to share positive feedback). This could be manned by the Food Development Workers on a rota system.

It is noted that the RRU is currently developing a Community Food Co-operative Handbook for volunteers (mentioned above) which is being designed to give volunteers all the necessary information to run a co-op and to keep it running. This is a welcome development, the impact of which will need to be monitored.

On the basis of maintaining the current coverage and focusing the support on the establishment and early development of the food co-ops it is recommended that the current level of staffing is maintained but with support through ongoing ‘remote’ or virtual assistance as outlined above.

9.3 Recognising the wider benefits of community food co-ops

The evidence has shown that the benefits of community food co-ops extend across many policy areas including health and well-being, community development, community engagement and cohesion, community regeneration, the voluntary sector, economy, skills and education and transport and the environment. This suggests that there is the potential for cross-departmental working to develop the programme.

For example, there are opportunities for volunteering within the co-ops that could be offered to people (for example through a labour market activation programme) looking to increase their employability skills or to take steps towards work. Within the Welsh Government’s food strategy, there is an emphasis on the encouragement of eating seasonally – community food co-ops are in a key position to support this through both awareness-raising and local produce availability. Community food co-ops also support the reduction of food miles, packaging waste and the carbon footprint. The positive impact on social cohesion and community engagement has also been evidenced in the report.

9.4 Increasing the diversity of the customer and volunteer profile

Community food co-op customers are generally from older groups. There is a need to encourage and facilitate access to some groups that are currently under-represented among customers – for example, families/young mums, young people and working adults, and particularly those with children. This could be done by linking further with schools, libraries, early years settings, leisure centres, youth clubs or play facilities and through linking with targeted programmes such as Change4Life. There are also benefits in linking in with customers or users of existing community-based activities (for example, exercise and health, dieting or fitness clubs, luncheon clubs and so forth) where there is an established group to engage with which can help to both widen the customer base for the co-ops in terms of volume and demographic as well as provide a greater opportunity for longer term sustainability.

However, whether low take-up is due to a lack of awareness or because of some other factors requires further investigation. The timing of the co-ops (both the time of day and the day itself) may contribute to the relatively low take-up among the younger population – running co-ops later in the day or on a weekend would ensure that those who are working could access them.

There may also be the potential to expand the provision of community food co-ops in the workplace, linking in to promoting health and well-being at work (it is understood that in some local authorities staff are allowed to put in time to run community food co-ops for this purpose).

9.5 Recognition of volunteer input

Many of the volunteers have been with the co-ops for some time, making a significant contribution to the sustainability of the community food co-ops. It is important to recognise this contribution. For example, it may be possible for them to achieve some kind of award or accredited learning outcome so that they gain recognition for the skills they have learnt and the contribution they have made. Volunteers may also benefit from being part of a recognised network of volunteers, putting them into contact with other volunteers and providing some form of community with national identity. This could include the general sharing of good practice as well as the provision of support and general liaison opportunities through, for example, volunteer networks on online forums. Links may be further developed with local volunteer centres, Volunteering Wales or Volunteers UK. Establishing a Twitter account for the Community Food Co-operative Programme and encouraging ‘followers’ among the volunteers and setting up a Facebook group is also recommended, taking into account the broad range of current and potential volunteers and customers.

9.6 Marketing and promotion of community food co-ops

Feedback from volunteers indicated a demand for advice and support to help market and promote the community food co-ops – to help them retain and increase custom and encourage volunteer involvement. It is recommended that more advice be made available both remotely (such as the volunteer website ‘portal’ suggested in Section 9.2) and in hard copy (such as in the volunteer handbook currently under development) to provide advice on themes such as how to get local press coverage, how to write a news release and other alternative methods to promote the work of the food co-ops.

The availability of low cost fruit and vegetables from local supermarkets may have an impact on demand for fruit and vegetable bags from the co-op. Supporting local farmers was not given by customers as a primary reason for purchasing fruit and vegetable bags. Raising the prominence of this benefit – being able to purchase locally produced/sourced produce in the community and supporting local businesses as a result – would help to emphasise this as a benefit of community food co-ops. Further links with community growers (supported in the Community Grown Action Plan and the Strategic Action Plan for the Welsh Horticultural Industry) should be pursued, as well as developing a stronger promotional link to Wales the True Taste brand. More locally, there may be periodic opportunities to link with, for example, Food Festivals, to further raise awareness of community food co-ops.

There are other messages from within this evaluation which could be usefully used in promotional materials. Using the positive evaluation evidence from volunteers in promotional materials may encourage more volunteers to come forward (for example, emphasising the skills learnt and the new social networks established). Community food co-op marketing could also emphasise the ethical trading system being adopted through knowing where produce is sourced from, supporting the local economy, using less packaging and so forth. Adopting a ‘Fair Trade at Home’ approach whereby suppliers decide on what they supply within a cost limit indicated by the volunteer (eg, £3 a bag) also supports this ethical trading approach, whereby the supplier is paid on delivery (thus helping cash flow).

A continued and key focus on the health benefits of the programme, in particular in areas of social, economic or rural deprivation should remain.

9.7 Increasing sales and customer retention

Although there is currently no membership requirement for customers, there may be merit in the introduction of a free (voluntary) customer membership scheme to gather more information on customers (such as basic demographic information, postcodes etc) which would help to develop a customer profile, which in turn would assist in targeting new customers.

Maintaining co-ops in school based settings are a particular challenge, particular during school holidays as well as generally maintaining momentum as interest wanes once the ‘novelty’ factor has worn off. Pursuing opportunities to continue the co-ops perhaps at an alternative location during school holidays (for example, local community centre or village hall) that would coincide with other activities (such as summer playschemes) would be of benefit.

9.8 Expanding produce available

Evidence to date from the pilots supplying additional produce such as meat, fish, eggs and bread suggests that these are having some success and that the demand is there. There is the potential for this provision to be expanded.

9.9 Addressing ‘quality’ issues

There were some concerns about the quality of the fruit and vegetables available via the community food co-ops. It is likely that in some cases this is around managing expectations (for example, a perception that potatoes would be washed or that vegetables should be of a relatively uniform shape); however, preserving quality in fruit may be a particular issue for consideration particularly around handling and storage within the co-op host site.

9.10 Enabling co-ops to become self-sustainable

A recurrent theme running through the recommendations listed so far is identifying ways to support the ongoing success and sustainability of the co-ops, to ensure they become self-sufficient thus reducing their reliance on the Food Development Workers. This in turn would enable the workers to concentrate more on identifying new opportunities, helping food co-ops to set up and become established, and building future partnerships.

To summarise the points made earlier, the recommended actions to support this include:

- A redefining of the Food Development Worker role to ensure that their expertise is used efficiently at the co-op development, inception and early delivery stages with 'arms-length' ongoing support delivered remotely via online and central telephone support.
- A retention of the current staffing and coverage levels to ensure that the 'start-up' role is not compromised (which could lead to co-ops being less sustained in the future).
- The provision of remote virtual on-going support to empower food co-ops to be more self sustainable and less reliant on the support of the FDW. This could include encouraging volunteers to be part of a virtual community through online support and through the handbook currently being developed)
- Facilitate volunteer interaction *between* co-ops to enable the sharing of good practice, advice on commonly experienced problems and to provide general peer support.
- Linking in where possible with established local community groups and networks, to help raise the profile, increase and broaden the customer base and provide longer-term security
- Linking volunteer activities to rewards or achievements which may help to retain volunteers and for the role to be seen as one that is part of a recognised network and has wider benefits or outcomes (for example, increasing employability)
- Providing more specific practical help to volunteers on promotion and marketing to ensure their co-ops are sustained.
- Conducting further marketing activities which emphasise the wider benefits of purchasing through a community food co-op (for example, locally sourced produce, supporting local businesses, reducing food miles and so forth)
- Introduction of a free membership scheme to encourage customer retention (and to provide further data on the customer profile, which in turn may help to identify customer groups).

Annex A Volunteer Questionnaire (telephone survey)

INTERVIEWER _____ ID NO. _____ DATE _____

INTRODUCTION

Good morning/afternoon/evening, can I speak to <VOLUNTEER NAME> please?

My name is.....from BMG Research and I am calling on behalf of the Welsh Government, who have asked us to evaluate the Food Co-op Programme. You might remember receiving a letter recently about taking part in a survey about your role as a volunteer at the <GET CO-OP NAME FROM DATABASE> food co-operative - do you recall receiving the letter?

READ IF NECESSARY OR IF RESPONDENT DOES NOT RECALL THE LETTER

The Welsh Government would like to know about your experiences as a volunteer in the food co-op programme. We're interested in why you decided to become a volunteer, your favourite and least favourite parts of your role, your views on the usefulness of the scheme in terms of improving peoples' diets, and wider impacts, plus any suggestions you have for improving the scheme.

Could I please take 10 minutes of your time to ask you some questions? Are you happy for the survey to be carried out in English? If you would like the questions to be asked in Welsh we can take your details and contact you again. **TAKE NAME AND CONTACT DETAILS AND MAKE AN APPOINTMENT**

IF RESPONDENT IS UNDER 16 CHECK PERMISSION WITH PARENT/CARER

The call may be recorded for training purposes, any information you provide will be treated in the strictest confidence. The information will be used by the Welsh Government to develop and improve the community food co-op programme.

S1. Could you please tell me if you are still currently involved in your food co-op?

READ OUT AND CODE ONE ONLY

1. Yes
2. No

S2. Could you please tell me the type of organisation in which your co-op is/was based?

READ OUT AND CODE ONE ONLY

1. In a school/College/University
2. In a community centre/church/village hall
3. In a workplace
95. Other, please specify

Section A: Volunteering

Q1. How long have you been/were you involved in your food co-op?

READ OUT AND CODE ALL THAT APPLY

1. Less than 6 months
2. Between 6 months and a year
3. Between one year and 18 months
4. 18 months to two years
5. Two or more years
97. Don't know

Q2. How did you find out about the opportunity?

READ OUT AND CODE ALL THAT APPLY

1. You saw an advert
2. You received a leaflet through the door
3. You already bought fruit and veg bags from the co-op
4. You already attended the school/hall/community centre/church/workplace for other reasons
5. You went to a presentation or event
6. You found out about it through a voluntary organisation or Communities First link
7. You heard about it through Word of mouth GO TO Q2a
8. You found out about this co-op after being involved in another co-op
95. Other, please specify

Q2a You mentioned that you heard about the co-op scheme through word of mouth. Could you please tell me where this word of mouth came from?

PROBE AND WRITE IN VERBATIM

Q3. We would also like to know why you decided to become involved in this project. I am now going to read out a series of statements and I would like you to say whether or not you agree with them. Please answer strongly agree, slightly agree, neither, slightly disagree or strongly disagree for each statement. Why did you decide to get involved in the food co-op scheme?

INTERVIEWER NOTE: THIS QUESTION IS TO DO WITH THE THINGS THAT ATTRACTED THE RESPONDENTS TO THEIR VOLUNTEER ROLE

READ OUT FOR EACH: YOU BECAME INVOLVED IN THE CO-OP SCHEME ...

	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Don't know (DO NOT READ OUT)

	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Don't know (DO NOT READ OUT)
A. to learn something new	1	2	3	4	5	97
B. to meet new people	1	2	3	4	5	97
C. to develop your skills and improve your CV	1	2	3	4	5	97
D. because you are interested in healthy eating and wanted to get involved in a related project	1	2	3	4	5	97
E. You wanted to help people eat healthier	1	2	3	4	5	97
F. It looked as if it would be good fun	1	2	3	4	5	97
G. to contribute something to the community	1	2	3	4	5	97
H. to get out of the house more	1	2	3	4	5	97
I. to help get local food to people	1	2	3	4	5	97
J. to help support the local food industry	1	2	3	4	5	97
K. to help gain Healthy Schools accreditation	1	2	3	4	5	97

If YES as S1

Q4. Do you see yourself staying involved in the co-op scheme over the next 12 months?

READ OUT AND CODE ONE ONLY

1. Yes **Go to Q6**
2. No **Go to Q5.**
97. Not sure **Go to Q5**

IF 2/3 at Q4

Q5. Why do you say that?

READ OUT AND CODE ALL THAT APPLY

1. It takes up too much time
2. Because of family commitments
3. Because of work commitments
4. Because you want to spend your time doing something else
5. Because of health reasons
6. Because there is not enough demand for the bags
7. Because you don't enjoy it anymore

8. Because you don't feel valued or get enough back

95. Other, please specify

Q6. I am now going to read out a series of statements and I would like you to say whether or not you agree with them. Please answer strongly agree, slightly agree, neither, slightly disagree or strongly disagree for each statement. Overall, what would you say have been the benefits for you personally about getting involved in the co-op scheme? READ OUT FOR EACH – You have...

NOTE TO INTERVIEWER – THIS PART IS MEANT TO CAPTURE WHAT THE RESPONDENT HAS GAINED FROM THEIR EXPERIENCE

	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Don't know (DO NOT READ OUT)
A. learnt something new	1	2	3	4	5	97
B. met new people	1	2	3	4	5	97
C. developed your skills and improved your CV	1	2	3	4	5	97
D. developed your personal attributes, for example, more confidence and a greater self-esteem	1	2	3	4	5	97
E. helped people to eat healthier	1	2	3	4	5	97
F. contributed something to the community	1	2	3	4	5	97
G. got out of the house more	1	2	3	4	5	97

Q6a. Is there anything else that you have gained from your involvement in the food co-op scheme that we have not already mentioned?

PROBE AND WRITE IN VERBATIM

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Q7. What would you say have been the hardest bits about volunteering at your co-op?

PROBE AND WRITE IN VERBATIM

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Section B: The food co-ops

Q8. To what extent do you agree with the following statement? Please answer strongly agree, slightly agree, neither, slightly disagree or strongly disagree for each statement.

	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Don't know (DO NOT READ OUT)
A. Customers of your food co-op now eat more fruit and vegetables than they did before they joined the co-op	1	2	3	4	5	97
B. You, <i>yourself</i> , eat more fruit and vegetables now than you did <i>before</i> you got involved in the food co-op	1	2	3	4	5	97
C. Food co-op customers now buy more local produce outside the co-op than they used to	1	2	3	4	5	97
D. You, <i>yourself</i> , now buy more local produce outside the co-op than you used to	1	2	3	4	5	97
E. The food co-op has helped improve relationships within the community	1	2	3	4	5	97

Q9. Does/did your co-op run alongside or have partnerships with any other initiatives or activities?

CODE ONE ONLY

- 1. Yes Continue
- 2. No Go to Q11
- 97. DK Go to Q11

Q10. What other initiatives or activities run/ran alongside your food co-op?

READ OUT AND CODE ALL THAT APPLY

- 1. Tea and coffee
- 2. Learning/education/training classes or clubs
- 3. Mother and baby or child events
- 4. Slimming or health related activities
- 5. There is other produce for sale
- 95. Other, please specify

Q11. In your opinion, what are/were the reasons for customers leaving the co-op?

READ OUT AND CODE ALL THAT APPLY

- 1. The cost of the bags
- 2. The quality of the produce
- 3. The quantity of the produce
- 4. The lack of variety in the bags

5. Inconvenient bag collection times
6. Having to order a week in advance
7. Inability to choose the fruit and vegetables you order
8. The location of the food co-op
9. Personal reasons (eg, health, moving away)
10. Availability of low cost fruit/veg elsewhere (eg, supermarkets)
95. Other, please specify

Q12. What would you say is/was the MAIN reason for customers leaving the co-op?

LIST FROM THE MENTIONS AT Q11 IF TWO OR MORE MENTIONED AT Q11

Q13. What kinds of things have you done/did you do to encourage customers to continue buying the fruit and veg bags?

READ OUT AND CODE ALL THAT APPLY

1. You have suggested recipe ideas
2. You have offered food preparation guidance
3. You have given information on different types of fruit and vegetable
4. You have explained the benefits of a healthy diet
5. You have distributed leaflets and posters
95. Other, please specify

Q14. To what extent do you agree with the following statements? Please answer strongly agree, slightly agree, neither, slightly disagree or strongly disagree for each statement.

READ OUT FOR EACH

	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Don't know (DO NOT READ OUT)
A. You receive/received enough support from your food development worker	1	2	3	4	5	97
B. Your Food Development Worker is/was available when you need/needed them	1	2	3	4	5	97

Q15. Overall, with your experiences in mind, would you recommend becoming a volunteer at a food co-op to one of your friends?

1. Yes Go to Q16a
2. No Go to Q16b
97. Not sure Go to Q16b

Q16a. Why would you recommend becoming a volunteer at a food co-op to one of your friends?

PROBE AND WRITE IN VERBATIM

Q16b. Why would you NOT recommend becoming a volunteer at a food co-op to one of your friends?

PROBE AND WRITE IN VERBATIM

Q17. Have you got any suggestions for improving your food co-op?

PROBE AND WRITE IN VERBATIM

I am now going to ask you for a few personal details. I would like to repeat that any information you provide will be treated with the strictest of confidence.

Q18. In which of the following age brackets do you fall?

READ OUT AND CODE ONE ONLY

1. Under 16
2. 17-20
3. 21-30
4. 31-40
5. 41-50
6. 51-60
7. 60+

Q19. Do you have a long-standing illness/disability or learning difficulty? By long-standing I mean anything that has troubled you over a period of time or that is likely to affect you over a period of time.

READ OUT AND CODE ONE ONLY

- 1. YES CONTINUE
- 2. NO SKIP TO QUESTION 21
- 97. PREFER NOT TO SAY SKIP TO QUESTION 21

WHERE YES:

Q20. Does this illness or disability limit your everyday activities in any way?

CODE ONE ONLY

- 1. Yes
- 2. No
- 97. Don't know

ASK ALL:

Q21. Which of the following ethnic groups do you belong to? READ OUT AND CODE ONE ONLY

- 1. White British
- 2. White non-British
- 3. Asian British
- 4. Asian non-British
- 5. Black British
- 6. Black non-British
- 7. Mixed
- 8. Chinese
- 95. Other - SPECIFY
- 98. Prefer not to say

Q22. What is your current economic status?

READ OUT AND CODE ONE ONLY

1. In a full-time job (over 30 hours a week)
2. In a part-time job (less than 30 hours a week if this is your main activity)
3. Out of work and looking for work
4. Out of work and not looking for work (eg, long term sick/disabled)
5. In full-time school, college or University
6. Caring for dependent child
7. Caring for dependent adult
8. Retired from paid work
95. Other – SPECIFY

Q23. It is possible that we will contact you again for research purposes regarding the food co-op evaluation. Would this be OK ...? CODE ONE ONLY

- 1 Yes
- 2 No

READ OUT

Thank you very much for completing the questionnaire.

THANK AND CLOSE

Annex B Copy of Customer Questionnaire (self-completion)

Buying fruit and vegetables from your local food co-op?

Please tell us your views!

The Welsh Assembly Government has asked
BMG Research to find out what people think of
their local food co-op and fruit/veg bags

Could you spare 5 minutes to complete this short
survey?

Please use a black or blue pen & mark your answer with a cross in the box .
Then put the questionnaire in the envelope, seal it and give it back

--	--

Office use only

Q1. How long have you been buying fruit/veg bags at this food co-op?

(Please ☒ one box only)

Less than 3 months ☐ 3 to 6 months ☐ 6-12 months ☐ A year or more ☐

Q2. Do you agree or disagree with the following statements

(Please ☒ one box on each row)

"I buy fruit and veg bags from this food co-op because....	Agree a lot	Agree a bit	Neither	Disagree a bit	Disagree a lot
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A	...It's fresh	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BIt's from local farmers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CIt's cheap	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D	...It's good quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EIt's easy/convenient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FIt's good to support the local community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G	... I get to chat to people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H	Other reason(s) why you buy fruit and veg bags (<i>please write these in the box below</i>)					

main reasons that you buy the fruit and vegetable bags from the food co-op? *Please write the two letters in the boxes below:*

Q4. How likely is it that you will carry on buying produce from this food co-op? (*Please ☒ one box only*)

Very likely ☐ Quite likely ☐ Not very likely ☐ Not likely at all ☐

Q5 Why do you say that? *Please write in the box below*

Q6 Have you made any changes to what you buy and eat since using the food co-op? (Please ☒ one box on each row)

Since using the food co-op...

Yes

No

...I eat more fresh vegetables

5

5

...I eat more fresh fruit

9

☐

...My family eats more fresh vegetables

□

☐

...My family eats more fresh fruit

9

9

...I cook more meals from scratch

☐☐

...I buy more local produce

☐☐

Q7 Do you have any other comments to make about the food co-op?

To help us understand who uses food co-ops, please fill out the following (all information is anonymous)

Q8 Are you female or male? Female ☐ Male ☐

Q9. What age group are you in? **Please** ☒ *one box only*

18 or under 19-25 26-44 45-64 65 or over

☐ ☐ ☐ ☐ ☐

Q10 How many children (aged 16 or under) live with you?

None ☐ One ☐ 2-3 ☐ 4 or more ☐

Q11 Do you have any long-standing illness, disability or infirmity?

Yes ☐ No ☐

Q12. Which of the following ethnic groups do you belong to? **Please** ☒ *one box only*

White British ☐ Black non-British ☐

White non-British ☐ Mixed ☐

Asian British ☐ Chinese ☐

Asian non-British ☐ Other (please write in box) ☐

Black British ☐

Q13. What is your **main** current status? **Please tick** ✓ **one box only**

Mainly in school/education ☐ Mainly caring for child/family member ☐

Mainly not working (but looking for work) ☐ Mainly retired ☐

Mainly not working (not looking for a job) ☐ Other (please write in box) ☐

Mainly working ☐

Annex C Sampling approach for selection of co-ops for customer survey

- Data drawn from FDW regional returns to May 2010
- Manual count of 'live' schemes = 234
- Manual count of 'live' schemes with 20 or more customers per week = 85
- % of 20+ bags of total = number of schemes to be selected per site
- Schemes then to be selected to ensure range of types

Area	No. of 'live' schemes	% of overall	No of 'live' schemes with take-up of 20+ bags a week	% of 20+ schemes	Proposed number of 20+ sites for selection	Expected returns
Mid	31	13%	5	6%	3	30
South West	47	20%	25	29%	15	145
South East	57	24%	21	25%	13	125
West	22	9%	12	14%	7	70
North East	52	22%	13	15%	8	75
North West	25	11%	9	11%	6	55
Total	234	99%	85	100%	52	500

Annex D Full method for the calculation of numbers of volunteers, customers and bag sales data

The calculation of the figures for volunteers, customers and bag sales was taken from looking at the latest figures for the period February to March 2011, which the RRU confirms is representative of the average activity across the year.

The total number of volunteers involved is the sum of the average number of volunteers in each of the 276 live (as at June 2011) food co-ops at any one week.

The total volunteer time was calculated on the basis of each volunteer offering one hour of their time each week, and that each food co-op was open for an average of 40 weeks out of the year. In reality, many co-ops were open for almost all of the year, whereas most schools were only open in term time. Furthermore, most volunteers gave much more than one hour a week but again cautious estimates have been made.