

# DELIVERING MORE

## SCALING UP FARM TO SCHOOL PROGRAMS

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Featuring a report on  
**The Farm to School Distribution Learning Community**

and case study profiles of  
**The Appalachian Sustainable Agriculture Project** (Western North Carolina)  
**City Harvest** (New York City)  
**Farm to Table** (New Mexico)  
**The Center for Food & Justice** (Southern California)

by **Kristen Markley, Marion Kalb and Loren Gustafson**  
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**Kristen Markley** and **Marion Kalb**, project leaders for the Farm to School Distribution Project  
**Loren Gustafson**, editor

**Additional resources related to this publication are available on the Community Food Security Coalition web site at <http://foodsecurity.org/deliveringmore>**

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# EXECUTIVE SUMMARY

Farm to school efforts have expanded rapidly in the United States since the 1990s. From only a handful of projects in 1996, there are now over 2,000 programs in 42 states that bring farm fresh products into school meals. That record of success reflects a convergence of many factors, including concerns about rising childhood obesity and diabetes rates and growing interest in local foods. To continue to grow, farm to school programs must find ways to further develop their delivery systems. That is the focus of this booklet. Specifically: **How can farm to school programs continue to expand to reach more students and more schools?** What are the best long-term strategies for distribution in, for example, remote rural and large urban settings?

Since 2007, with the support of grants from **The UPS Foundation** and the **Compton Foundation**, the Community Food Security Coalition (CFSC) has worked with four partner organizations on strategic planning related to distribution systems to search for answers to these questions. This booklet shares some of their answers and explains the processes that they used to develop them. The **Introduction** examines the need for a focus on distribution issues and introduces the four partner organizations. The next section tells how the **Farm to School Distribution Learning Community** has brought people from across the country together to think about these issues. (It also includes a sidebar on the concept of a learning community.) The next section presents **Four Case Studies** of the partner organizations, beginning with a brief overview. Following these case studies, **Measuring Project Impact** presents indicator data participants tracked throughout the project as well as participants' comments and considers their implications. The **Resources** section provides contact information for the various organizations and the **Appendices** present the planning documents for each organization profiled.



Some core lessons learned that emerge in these stories:

- Because farm to school programs are complex and involve many local variables, there is no “one size fits all” distribution system.
- Strategic planning is essential to any major shift in scale or practice. It also requires time and cooperation; long-term follow-through is essential.
- Shifting from a startup mentality to a sustainability focus is difficult. The skills and approaches used in modifying and sustaining a pro-

gram may not be the same as those used to create it. It is important to identify training and technical assistance needs and reach out for support and new information.

- “Scaling up” may not be as easy as it seems. Delivering more products to more schools may conflict with other goals that require a direct connection between farmer and school.
- Measuring progress for multi-faceted programs such as farm to school is complex and takes time. It is important to be clear about intended impacts up front, to define measures and to create evaluation tools early on, to reflect upon evaluation practices and results regularly, and to modify evaluation practices in response to new insights.
- Building strong relationships and developing active partnerships are keys to success, no matter how large or small the program.

Farm to school programs are part of a movement to revive regional food systems and to bring understanding of local food production into the classroom. That is no small challenge. Strategic planning about distribution capacity is a necessary step in planning for future growth of farm to school programs.

# INTRODUCTION: THE DISTRIBUTION CAPACITY OF FARM TO SCHOOL PROGRAMS

Farm to school programs vary widely in geography, agriculture, school meal participation rates, and demographics. Some programs are community projects, with a committee actively developing and implementing the program. Others are initiated by food service directors who know farmers in their communities or by farmers whose children attend the local schools. Despite these differing circumstances, a common theme is resounding with greater frequency: how can we expand these efforts and provide more school children with farm fresh fruits and vegetables? Initial success has brought leaders in this movement to the next step in the process – scaling up their efforts to expand their programs in hard-to-reach places such as remote rural outliers and large, sprawling urban environments.

Dozens of groups are struggling with issues of moving product from field to cafeteria. Basic logistical matters such as aggregating supply and minimizing delivery costs and inconvenience are fundamental barriers to their success. Much of the infrastructure for regional food systems has been dismantled over the past fifty years, and the volume small farms produce is too low or handling costs too high for existing brokers. These groups differ in strategy, exploring various alternatives such as partnering with the Department of Defense's existing procurement program for schools, or creating farmer co-ops, non-profit brokerage businesses, and terminal markets for local farmers. Yet they share one commonality: as new social entrepreneurs without much business experience, they can benefit enormously from learning from each other. Because of the rapid expansion of programs and their diversity – including such factors as local crops, existing infrastructure, and attitudes – there has been relatively little strategic thinking about the long-term development of these programs.

## THE FARM TO SCHOOL DISTRIBUTION PARTNERS

CFSC wanted to find a way to facilitate strategic planning about the distribution infrastructure of farm to school programs. CFSC applied for a grant to help groups use strategic planning to expand and improve established farm to school programs, with the idea that the lessons from

this process might generalize, at least to some extent, to other farm to school programs. The grant was approved, and work began on the project in 2007.

CFSC worked with four different farm to school programs in areas of high food insecurity to use strategic planning to scale up the distribution options for their farm to school programs. The four partner organizations were:

- The Appalachian Sustainable Agriculture Project (ASAP)
- Farm to Table (FTT)
- City Harvest (CH)
- The Center for Food & Justice (CFJ)

ASAP is based in a rural Appalachian community in western North Carolina. FTT is based in rural New Mexico, with long distances between farmers and area schools. CH works with the New York City schools (with more than one million students), and CFJ is based in Southern California (and encompasses three different regions).



The four partners are all active members of the **National Farm to School Network**, which seeks to support community-based food systems, strengthen family farms, and improve student health by reducing childhood obesity. The network, which is made up of eight regional lead agencies, plays a key role in federal policy issues, marketing and outreach activities, training and technical assistance, information services, and networking. Le Adams of FTT and Emily Jackson of ASAP, are both regional leads with the network. Vanessa Zafjen is employed by CFJ, which is one of the co-leaders of the network, in partnership with the

Community Food Security Coalition. City Harvest, through Kristen Mancinelli, has played a key role in the development of the network. They all share a commitment to collaboration and to building the farm to school movement.

The partners each explored different models of organizing the supply chain from farmer to school district. Beginning in 2007, CFSC provided support through informational meetings, learning community activities, networking opportunities, evaluation tools and frameworks, and informal technical assistance. CFSC also provided funds to these four organizations as they attempted to develop expanded distribution systems that would increase the number of children served locally grown produce, expand the geographical area of their program, increase the number of farmers involved, and increase the number of dollars going to farmers.

Initially, CFSC hired a consultant experienced in the business logistics of supply and distribution infrastructure for local foods to assist each of the four regions in developing a strategic plan addressing issues of expansion both geographically and in numbers served. After two rounds of interviews, a consultant was hired and met with three of the partner groups in November 2007 to help them start their strategic planning work. It soon became evident that one consultant could not meet the varied needs of the four partners.

With the support of the four partner organizations, CFSC changed approach and organized a two-day session in February 2008 in Santa Fe, NM, with a professional facilitator and eight distribution experts who approached the topic from different perspectives. Because each program faces a unique set of circumstances, each program would have to create its own road map. Experts could provide information and perspective, but the answers would have to come from inside, not outside.

The presenters at this February 2008 session were an excellent resource for the group, representing different perspectives and regional experiences – non-profit, for-profit, farmer cooperatives, corporate sustainability programs, rural, urban, and other perspectives as well:

- Susan Crespi, Growers Collaborative, CA
- Glyen Holmes and Vonda Richardson, New North Florida Cooperative, FL
- Karyn Moscovitz, Grasshoppers Distribution, KY
- Anthony Flaccavento, Appalachian Sustainable Development, VA
- Jesse Singerman, Prairie Ventures, IA
- Pauline Raia, Food & Nutrition Service, Human Services Dept., NM
- Jamie Moore, Parkhurst Dining, PA
- Christine Grace Mitchell, Urban Food Systems Program, NYS Department of Agriculture and Markets

To begin the process of developing a strategic plan, each partner organization developed problem statements of the challenges they each faced in their regions in terms of ‘scaling-up’ distribution efforts for farm to school programs. This information was provided to the distribution experts in advance to help tailor the information they shared to meet the needs of each group. **These distribution problem statements are included with other key documents in Appendices A-D.**

For this workshop, each partner also invited one other person involved in their farm to school program, such as a representative of a state agency or a collaborating non-profit organization. The goal was to expose the partners to several very different but successful distribution models. To begin the day, the four partners gave a summary of their planned program expansion and solicited feedback from the eight presenters. Then the presenters provided information on their successful distribution programs. Each presenter gave a fifteen-minute presentation without slides, followed by a period of questions and conversation, giving

the participants a chance to hear multiple perspectives on matters of distribution and expansion.

The day after this workshop, there was a facilitated, one-day session to assist the partners as they continued to work on their strategic plans. To prepare for this session, each of the partners developed a vision statement for their program and also completed a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis. The group began the day together with a visioning exercise and discussion session. They then divided into groups to discuss their SWOT analyses and how they would help to guide strategic planning. The four groups then had time to work individually to further define and outline their strategic plans. All of the distribution experts, as well as the facilitator, were available to the four partners for follow up or additional consulting, which was paid for through the grant funding. Each partner was taking a separate path, but they were traveling at the same time through the strategic planning and implementation process.

The four partners also actively engaged in evaluation and tracking of indicators, lessons learned, and challenges related to their work. The topics tracked as impacts included project details and geography, amount of local food sold to schools, number of project partners, and project planning and implementation strategies. Lessons learned and challenges were also recorded. Each year, partners reported on the data and then met to discuss the impact and relevance of the data, learn from each other’s projects, and cull lessons learned. CFSC Evaluation Program Director Jeanette Abi-Nader designed the protocols and provided assistance and support throughout the evaluation process.

# THE FARM TO SCHOOL DISTRIBUTION LEARNING COMMUNITY

In addition to the work of these four organizations, CFSC created a learning community that included the four partner organizations and other farm to school enthusiasts from existing networks. This networking vehicle facilitated information sharing and communication among practitioners, enabling them to implement what they have learned in their own communities.

After the workshops with the four partner programs, approximately 25 people and organizations were invited to be part of the Farm to School Distribution Learning Community in 2007. This included the four partners featured in the case studies in this booklet and other staff members from nonprofit organizations, universities, state agencies (i.e., Cooperative Extension and State Departments of Agriculture) and USDA. CFSC attempted to involve successful farm to school practitioners who were considering the issues involved in program expansion. In response to many requests to participate in the learning community calls—including requests from USDA employees in the Agriculture Marketing Service and in Farm Credit Services—CFSC expanded the Learning Community membership to include about 40 individuals and organizations.

Although the five conference calls held were the main communication channels for the learning community, a short course, workshops and field trips also provided significant learning opportunities. The short course was held in Philadelphia in October 2008. Workshops and field trips related to distribution issues were part of the *4th National Farm to Cafeteria Conference: Going the Distance and Shortening it, From Farm to Cafeteria* in March 2009. The conference was sponsored by CFSC and several other organizations and was attended by over 650 participants. One field trip explored food innovation efforts, another the distribution chain supplying the University of Portland's farm to institution program. Both field trips filled to capacity. Five conference workshops, also well attended, addressed various issues related to distribution. **For summaries of the conference calls, materials from the short course, and descriptions of the distribution-related events, see the CFSC website (<http://foodsecurity.org/deliveringmore>).**

Through this overall program, funded through The UPS Foundation and the Compton Foundation, farm to school activists in the community food security movement deepened their knowledge of work that is taking place nationwide and applied what they have learned to benefit those in their region. Farm to school programs across the country will use the lessons from their efforts at strategic planning and collaborative learning to continue to build and expand the farm to school movement in the years ahead.

## *Why create a Learning Community?*

Learning communities (LC) are a proven professional development model used in healthcare, education and other areas (Lave & Wenger, 1991). CFSC has demonstrated the effectiveness of this model in the agricultural (i.e., farm to school) sector. The LC model complements, enhances, and sometimes replaces more traditional professional development options in a variety of sectors (Wenger & Snyder, 2002) and has had notable success within the agricultural and education sectors (Pothukuchi, 2007).

Anthropologists coined the term “Learning Communities” while studying the apprenticeship learning model, which involves a complex network of relationships through which learning takes place (Lave & Wenger, 1991). Typically comprised of experts in a designated field, successful LCs are defined by shared interest; relationships based on shared interest encourage joint activities and discussions, group support and information sharing. This approach assumes that practitioners are in the best position to take collective responsibility for managing the knowledge they need, which directly links learning with practice and performance (Wenger & Snyder, 2000; Wenger, McDermott & Snyder, 2002). Through conversations, practitioners develop their own narratives, stories and cases that become the basis for their professional practices. Developing LCs around identified interests helps create a culture where sharing knowledge and lifelong learning are highly valued and necessary (Davis & Davis, 2000).

LCs take advantage of the tremendous benefits of cooperative, team-based approaches to learning (Brody, 1998), and establish a venue for improvement through inquiry and problem solving (Stripling, 1999). LCs are ideal for those who share a commitment to hands-on service learning; as such, learning communities benefit communities as a whole (Stripling). New technologies including the Internet have extended the reach of communities' interactions beyond the geographic limitations of traditional communities. The LC model will encourage communities, such as the farm to school community, to build a robust network and to integrate lessons from projects around the country.

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# FOUR CASE STUDIES OF FARM TO SCHOOL STRATEGIC PLANNING

Farm to school programs have multiple purposes, usually some combination of the following: to bring fresh local produce and other agricultural products into schools to promote healthy student eating habits, to help local farmers (especially small and midsize farmers) prosper, and to educate students about food production close to where they live. Usually, these goals are complementary, but at times they may come into conflict.

As farm to school programs grow larger, they begin to move beyond a direct connection between school and farmer. In some cases, as startup funding runs out, schools must find ways to limit the time and effort spent researching the local food suppliers and look for greater efficiency. In some areas, farmers actively collaborate to deliver a fresh, reliable, ready-to-use product to schools. In other cases, food service directors look to established distributors as ready sources for local produce. A 2006 study from the University of Minnesota noted the conflict inherent in this approach: “One risk of sourcing through distributors is that a connection with individual farmers and a ‘sense of place’ may be lost as the organizational layers between the farmer and the lunch table increase” (Berkenkamp, 2006, p. 3). Farm to school programs must consider both the need for efficiency and the need for a connection to place in any plans for expanding service.



The following case studies reveal different versions of this underlying tension between expanding a program’s scope and sustaining its original vision. Each case is different, but each program profiled is searching for ways to expand. At times these case studies read like riddles or puzzles to be solved. Programs are trying to figure out how they can serve more produce to more students in more schools and still retain a recognizable “local” identity. They are struggling to create greater efficiencies to better serve farmers and food services without erasing the differences between local foods and standard commercial products.

The differences among these programs are not simply differences between rural and urban. Western North Carolina and New Mexico have large rural areas, but the program in North Carolina has three viable regional distribution options already available, whereas the program in New Mexico is working on creating distribution options one at a time. New York City and Southern California are both large urban centers but have very different issues and different agricultural economies. In

New York City, the issues revolve around learning to expand successful pilot programs within one school district of 1.2 million students. In California, expanding the program involves working with many different school districts, each with its own set of opportunities and challenges.

These examples illustrate both the challenges and the promise of farm to school programs. Though farm to school sales may begin as a relatively small percentage of overall food service budgets and of most farmers’ revenues, strategic planning can help to sustain and even increase those percentages over time. Because of the large numbers of meals involved (860,000 per day in NYC, for example), even small changes brought about through strategic planning can have a large impact over time. One challenge for farm to school programs is learning how to solve local issues in ways that build people’s problem-solving skills and their knowledge. Strategic planning activities are a good example of a response to that challenge. **The outlines of the four partner organizations’ strategic plans can be found in Appendices A-D.**

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## Appalachian Sustainable Agriculture Project (Western North Carolina)

Understanding the challenges and opportunities facing the Appalachian Sustainable Agriculture Project involves understanding something about the geography of Western North Carolina and about tobacco. Largely because of the mountainous terrain, small farms predominate in Western North Carolina, with more than half of all farms operating on less than 50 acres. The region is home to over 12,000 farms producing a wide variety of fruits and vegetables, meat and dairy products, and non-food crops like Christmas trees, tobacco, and nursery plants. Farms occupy a third of the privately owned land and in 2002 the region's farms earned \$543 million in cash receipts. Tourism, the number one industry, is driven largely by the scenic farm landscapes and natural beauty of the region. The small average farm size makes the region particularly vulnerable to a global food system dominated by fewer, larger farms, and fewer, larger markets. The amount of farmland has been steadily declining, according to U.S. Census data, with approximately 12 percent less farmland in the region in 2002 compared with 20 years earlier. Many mountain counties have lost farms at rates approaching 20 percent in the last decade.

The single largest influence on the North Carolina farm economy in recent years is the 2004 tobacco buyout—the Fair and Equitable Transition Act. The legislation eliminated federal price support and supply control programs that had regulated tobacco production and marketing since the Great Depression era. It opened tobacco to an unregulated, free market system beginning with the 2005 crop. Payments to growers and quota owners under the tobacco buyout are scheduled to take place over ten years, which means that the full effects of the buyout will not be known for some time. For North Carolina, number one in the U.S. in the production of tobacco with 36% to 38% of total tobacco production, the impact of the buyout has been and will continue to be dramatic. **Some experts estimate that as many as five out of six farmers growing tobacco will need to find another way to earn a living and that the majority of small-scale farms growing tobacco under the old system will no longer be viable in the tobacco market.** In Western North Carolina, with the tobacco buy-out looming, ASAP knew that there was a going to be a great need for markets in rural areas. Farm to school could meet that need and provide an opportunity for growers looking for markets.



Emily Jackson (center back), *Appalachian Sustainable Agriculture Project*

ASAP held its first farm to school workshop in 2004, with help from the Community Food Security Coalition. Since that time, ASAP has defined its farm to school program as primarily educational, with a focus on four components: school gardens, farm field trips, experiential nutrition education, and assistance to farmers who want access to the school market. ASAP does not play the role as broker between the schools and the farmer but instead helps build and maintain relationships and provide support to both groups to ensure sustainability. ASAP trains teachers to incorporate farm to school programming into their daily instruction; provides technical assistance and promotional assistance to farmer cooperatives, state farm to school programs, and participating produce distributors; and assists community groups that seek to establish farm to school programs.

### *Background on the Status of Distribution Systems at the Beginning of the Project*

In 2007, at the start of this project, ASAP had a group of farmers (Madison Family Farms) that were growing, selling, and distributing their food products to six K-12 schools in their county (spread out over 450 square miles). They also served nine K-12 schools in a neighboring county that is 30 miles away. Individual farmers were serving two other small, rural, mountainous communities—Mitchell and Yancey counties—each with approximately 2500 K-12 students. In Yancey County, the school system has its own truck to send out to the farm to pick up the farm product. In Mitchell County, the farmer delivers to each of the eight schools.

ASAP's challenge was that when new farmers were interested in this market, either they lacked the coordination of the Madison Family Farms, or the school system was too large for a farmer to deliver to each one. Other school systems in Buncombe, Henderson, and Haywood counties were expressing interest in farm to school. The largest of these, Buncombe County Schools, has 40 K-12 schools and approximately 25,000 students spread across a large, mountainous county that spans 656 square miles. No individual farmer could deliver to all of them. At the same time, ASAP also wanted to expand the potential for farm to school production and distribution in Yancey and Mitchell counties (which were being served by just one farmer).

Their distribution problem statement from February 2008 lays out some of the questions that they wanted to answer:

- What existing distribution networks already exist that could be

engaged in farm to school or what would it take for these entities to participate?

- If delivery is not possible to each individual school, what could be put in place that would serve the schools and farmers?
- What is the current infrastructure in the individual school systems to manage distribution (do they have central warehouses, trucks/drivers to go to the farm, etc.) and how can farmers meet the distribution needs of such diversity?
- What role can the DoD (Department of Defense) Fresh program or the NC Department of Agriculture Farm to School program play?

The answers to these questions shaped the direction of their strategic planning.

### *Strategic Plan Development and Implementation*

ASAP explored three existing distribution systems in its strategic planning process: 1) the state-sponsored North Carolina Farm to School Program, 2) existing produce distributors, and 3) farmer direct (Madison Farms, a farmer cooperative). ASAP interacts with each of these models in different ways.

### *The North Carolina Department of Agriculture and Consumer Services Farm to School Program*

In North Carolina, there is a state farm to school program that is operated by the North Carolina Department of Agriculture & Consumer Services (NCDA&CS). In the eastern part of the state (outside the ASAP service area) farms are much larger and produce a variety of commodity crops. In Western North Carolina, the only locally grown commodity included in the program is apples. At certain times of the year, the program is able to offer child nutrition directors a variety of fruits and vegetables (watermelons, cantaloupes, strawberries, blueberries, apples, grape tomatoes, cucumbers, cabbage, broccoli, and sweet potatoes). The program utilizes their system of trucks and warehouses across the state to do this (North Carolina is one of only three states to have this state-supported infrastructure).

ASAP now works with NCDA&CS to identify growers in western North Carolina and assists those farmers in meeting the needs and requirements of the program. There is a 15,000-square-foot refrigerated warehouse that is currently being assessed for its potential for farm to school purposes. Small farmers could pool their product together in a central location and make pick up easier for NCDA&CS (traveling to small farms throughout the mountainous counties would be too difficult).

### *Working with Existing Produce Distributors*

The second model is working with existing produce distributors. ASAP,

as the Regional Lead Agency for the National Farm to School Network, is given the responsibility of providing training and technical assistance to farm to school programs throughout the Southeast. A new program in Anderson, SC, provided information about an existing produce distributor, Carolina Produce (CP). Carolina Produce is dedicated to sourcing local product whenever possible. They also work mainly with school systems – in upstate SC as well as many school systems in Western North Carolina. CP joined ASAP’s *Appalachian Grown* program, which “certifies food and agricultural products grown or raised on farms in Western North Carolina and the Southern Appalachian mountains.” What most districts like about Carolina Produce is that they can customize a plan that works for each school district. CP knows the schools’ needs and makes the process as simple as possible for the food service directors and managers. An example of this is a great number of districts do not have a warehouse facility to receive and distribute to their schools. CP will distribute the local product to a school as a “value added service.” In the 2008-09 school year, CP received the produce bid from Henderson, Asheville City, and Buncombe County schools, enabling local product to be delivered to over 60 schools and to over 40,000 students. There is great potential for the amount of local product to be increased over time.

Research with other distributors has identified a couple key barriers: unwillingness to share farmer lists and lack of interest in providing services to schools. Two school systems, Mitchell and Yancey County schools, purchase their produce from the JMJ Company, located in Asheville, NC. Both child nutrition directors in these school districts desire to identify farmers that supply JMJ with local produce to be identified and certified *Appalachian Grown*. However, the JMJ owner does not want to share her list of farmers, and at least for now, ASAP will be unable to determine the amount of locally grown produce the company supplies to schools. Another local distributor, Mountain Foods, has a strong interest in supporting local farmers but focuses on produce distribution to restaurants in the Asheville area. Mountain Foods expressed interest in providing warehouse space for area farmers but did not want to provide services to schools.

By working through existing distributors, ASAP has found that many schools in the area are more willing to participate in farm to school programs. This model is also appealing to farmers who are new to farm to school outlets. It is perhaps easier for the farmer to develop a relationship with a local distributor than to establish one with the local school system. The local distributor can also provide access to other markets such as restaurants, hospitals, colleges and senior facilities. ASAP is currently engaged in farm to hospital and a farm to senior facility program (in addition to farm to school). This has increased ASAP’s ability to share the information gleaned from this project with many other farmers in the ASAP service area. Through this model, a large amount of produce can be delivered to a relatively large area through many farms pooling their product together. Possible disadvantages include that the identity of the individual farms can be lost—food can get mislabeled

and switches to non-local sources are easier. In addition, finding new farms is time consuming.

### *Direct from the Farm*

The third model is farmer direct, exemplified by Madison Farms, a farmer cooperative. Madison Farms is a network of family farmers in Madison and surrounding counties of North Carolina who have come together to market and distribute locally grown produce to several school systems in western North Carolina. Madison County Schools and two local colleges—Mars Hill College and the University of North Carolina at Asheville—have purchased fresh produce from Madison Farms. Madison Farms and area farmers have been working with school food service to develop a plan for implementing the purchase of locally produced foods into their school food systems. ASAP provides training and technical assistance and also highlights the farm to school program in its educational programming within the county.

In studying this model, ASAP identified a variety of crops that local farmers are producing and pooling together for the schools. These crops include lettuce, potatoes, squash, tomatoes, watermelons, broccoli, apples, cabbage, cucumbers, sweet potatoes, cantaloupe, and blueberries. Local farmers have also supplied beef a couple times. A professional, commercial site has been developed to prepare, package and store these products prior to delivery. Participating farmers are certified in “Good Agricultural Practices” (GAP) through a training workshop sponsored by North Carolina Cooperative Extension. Madison Farms also participates in the NC Farm to School program.

Deliveries are made to each school system. The Madison School system comprises six schools and averages 2,500 K-12 students, spread out over 450 square miles. Madison Farms has one truck and two farmers that spend 25% of their time coordinating production and delivery. Farms in Madison County are small and have traditionally been burley tobacco farms, a product that was harvested once and delivered to a single location; the delivery of fresh produce presents a new set of challenges. This is a very rural county, with winding mountain roads and small schools at the far reaches of the county. The advantage of this model is that when farmers pool their product, school systems only deal with one farmer and pay one invoice. The limitations of this model are the time it takes to deliver to each school and that the whole system relies on one truck.

### *Plans for the Future*

ASAP determined that their overall mission for scaling-up distribu-

tion systems for farm to school programs is to “utilize existing systems when possible, build farmer capacity to meet institutional market requirements, and to promote local agriculture in western NC and the southern Appalachians (and throughout Kentucky, Tennessee, North Carolina, South Carolina, Georgia and Florida as the Southeast Regional Lead Agency for the National Farm to School Network).” Their strategic plan concentrates on three specific goals that connect to this overall mission:

- 1) **Build partnerships with area distributors and raise their awareness of the *Appalachian Grown* program.**
- 2) **Build the capacity of farmers to meet demands and requirements of distributors.**
- 3) **Develop plans to work with the state farm to school program.**



Additional work yet to do is to explore the financial constraints of building local distribution infrastructure, to quantify the market potential for farm to school (currently being studied in a Southern Region Sustainable Agriculture Research and Education project described below), to identify other food service distributors willing to look at local sourcing, and to develop policy proposals that could provide resources to area farmers. Carolina Farm Credit has expressed interest in local food system work and has agreed to help develop business plans and projections that would address future opportunities. Having helped to create demand for local products, ASAP is now helping to supply that demand.

### *Market Potential: The Southern Region Sustainable Agriculture Research and Education project*

As part of a Southern Region Sustainable Agriculture Research and Education (SSARE) research project, ASAP conducted a market assessment of farm to school activities in a three-county area. The results of the analysis indicate that current demand and use of produce in general, and locally grown products in particular, by the participating school districts is concentrated on a very few fresh fruits and vegetables—specifically, tomatoes, potatoes, lettuce, and apples. This finding is important for two reasons: it reflects potential for growth, and it suggests that schools interested in supporting local farmers can allocate a relatively high share of total expenditures for fresh fruits and vegetables to those few locally grown products with the highest demand.

The data suggest that expenditures on local fruits and vegetables could increase to 71% of the current expenditures for fresh produce (to about \$6.60/student per year and a total of \$48,000 for the three school districts), well above the current 18% level in the region (about \$1.70/stu-

dent per year or a total of \$13,000 for the three school districts). Even though these figures are based on data from only three counties, they can be used to estimate the potential of farm to school programs as a market for agricultural products at the state and national level.

**The profitability analysis indicates that the net returns that farmers obtained from marketing products to the school districts during the school period 2006-2007 were substantially higher than those that are usually obtained from selling their products to other venues.**

However, more work is needed to study the profitability of the farm to school programs market in the long run and to measure the extra costs incurred by farmers to market their products to schools.

Future research will also consider the market potential for *processed* food and vegetables. Processed fruits and vegetables require produce as one of the inputs and can have a positive effect not only on the regional farms but also on other sectors of the local economy. Processed fruits and vegetables purchased by schools are also “value-added” opportunities for farmers or local entrepreneurs. In the future, the use of processed foods in schools can also be tied to the educational experiences for students, parents and teachers in the same way that agricultural production has been linked to the use of fresh fruits and vegetables. When this research project is expanded to include the potential for processed foods of all food products that can be grown in the area and are currently being purchased by local school systems, ASAP and project partners will engage the services of a local credit and financial institution (Farm Credit) to determine the financial viability and sustainability of current farm to school programs and to explore the point at which investors might participate.

No amount of study or planning can remove the challenges that western North Carolina’s beautiful mountains create for the region’s farmers. As a result of strategic planning, ASAP has a plan to help expand the distribution of fresh local fruits and vegetables in school meals through its *Appalachian Grown* certification program and through cooperation with both the state-sponsored farm to school program and local grass-roots efforts. Cooperation is the key. As Emily Jackson puts it, ASAP “will continue to identify the many local distributors and packing houses that are critical to farm to school success” and help them work with local schools and local growers.

## Farm to Table (New Mexico)

Farm to Table (FTT) is a non-profit educational organization that works throughout the Southwest to improve communities' access to nutritious, affordable, locally grown, and culturally significant foods by linking local food production to local needs. Farm to Table ran farm to school education activities, mostly in Santa Fe, for approximately five years prior to this project. That program consisted of farmer visits to the classroom, farm field trips, school gardens, farm to school education at special events such as career days, and educational programming at the Santa Fe Farmers' Market.

In recent years, Farm to Table has focused on more "farm to cafeteria" activities, working directly with farmers and farmer groups to increase and develop farm to institution sales and also with food service personnel to facilitate their purchase and use of fresh local fruits and vegetables for both meal and snack programs. They have worked and continue to work on policy changes that improve the way children are eating in school environments. As a small organization, Farm to Table learned early on that partnerships are the key to success. They established the New Mexico Food & Agriculture Policy Council, which includes representatives from a large number of agencies and organizations and establishes yearly priorities for legislation. The Council also provides expert testimony on policy issues related to agriculture, food, and health. In addition to this work, Farm to Table also provides agricultural marketing training for farmers and ranchers. These program areas all include public-private partnerships. Partners in the farm to school program include the NM Department of Agriculture, Marketing Division; school districts that are currently purchasing local foods; the NM Apple Council (a farmer organization); and representatives from several distribution entities.



Le Adams, *Farm to Table*

New Mexico is a very rural state. The major population centers are clustered near the Rio Grande, which bisects the state north to south. There is one very large school district and a few medium size ones, but the majority of the 90 districts are very small. The farms in the southern part of the state are very large and grow very few vegetable and fruit crops. The farms in the northern part of the state tend to be very small, with only a small number developing into midsize farms which could support large institutional sales, indicating a need for farmer collaborations.

### *Background on the Status of Distribution Systems at the Beginning of the Project*

Farm to Table found that distribution of produce in rural New Mexico

is difficult for small farmers and is not particularly lucrative for professional distributors. They had experimented with one potential distribution method: they purchased apples from the eastern side of the state and delivered them to a central location of the established distribution system of the state Commodities Bureau.

Some of the major problems facing farm to school in New Mexico are that farms are so spread out and farmers do not have a history of working well together in cooperative systems. Developing a collaborative model for farmers for brokering, transportation, and minimal processing has been a dream for Farm to Table for several years now, but the first step is asking some fundamental questions:

- How doable is this model?
- Who are the players?
- Who is distributing and processing now?
- What really are the needs of local farmers for infrastructure and brokering?
- Is this model forming now? Is there a way to take its development up a notch?
- How involved should or could a non-profit educational organization such as Farm to Table be in the development of such a venture?

FTT faces challenges on many levels. One very powerful distributor services most of the school districts. Food services do not see the need to go out of their way to order from anyone else. The status quo is a lot easier than doing something new. Although independent farmers are not used to working together, cooperation may be needed in order to supply sufficient amounts of product to meet schools' needs. At the same time, some farmers may not even be aware of the opportunities within the school market. The great distances between farms and buyers coupled with rising fuel prices create another set of challenges.

In addition, school food service is constrained by very tight budgets. FTT faces the challenge of introducing fresh local food and running education programs that will foster acceptance of these foods by school children and their families.

### *Strategic Plan Development and Implementation*

Farm to Table developed a strategic plan for farm to school in New Mexico to connect many disparate activities. Farm to Table's strategic plan goals are as follows:

- 1) **Better agricultural production: Increase year round sup-**

- ply and high quality produce for sales to schools**
- 2) **Better post harvest handling**
  - 3) **Increased marketing and distribution of products to schools**
  - 4) **Increased consumption of local fruits and vegetables by schoolchildren**
  - 5) **Additional policy change, structural change, resources (These resources and activities affect all aspects of this plan.)**

Prior to this project, Farm to Table was working on one farm to school project at a time, generally with no strategic planning involved. This usually involved working with whichever group seemed the most insistent or in the area that had funding support. In their first planning session they selected certain geographic areas of the state that seemed like prime targets for intensive outreach in farm to school activity and education. These areas ranged from Doña Ana County (Las Cruces) in the south, Grant County (Silver City) in the southwest, San Juan County (Farmington), McKinley County (Gallup) and tribal lands in the northwest and the “Taos Cluster”—Taos, Colfax, Mora and San Miguel Counties—in north central New Mexico. These counties were chosen for a variety of reasons, including existing programs, proximity of farms, statements of interest from food service, and state legislators friendly to the idea of farm to school. New Mexico is approximately 400 miles north to south, and these focus areas cover almost the full length of the state.



Farm to Table then developed a survey for farmers and food service directors that resulted in directories to assist them in locating each other. During the course of the project, several innovative distribution systems for farm to school were supported or newly developed. Farm to Table is also working to develop lasting relationships with existing small distributors that already work with school districts for local food pickups. Here are some of the innovations within the distribution system that FTT worked on:

#### *Coordination with the Nutrition Bureau of the NM Human Services Department*

The Nutrition Bureau regularly delivers USDA commodity products to both the food bank and the school system. One time per month, in a four week rotation, their trucks deliver to the four quadrants of the state. The farm to school program has been able to piggyback a load of farmers’ products into their return trip (which would usually be empty) from a rural, more isolated area of the state into the central hub (Albuquerque.) From there, local school districts are able to pick up this

product (or accept delivery) and integrate it into their cafeteria supply. The Nutrition Bureau director is the lynchpin here. It is her stated desire to support farm to school development by assisting with delivery for the benefit of school districts. If this system grows to include more products, more districts, and more farms, additional resources to help with coordination may be needed.

#### *La Montanita Food Co-op Food-Shed Project*

In 2007 La Montanita, a member-owned food cooperative, launched its Regional Food-Shed Project, with the goal of helping to develop a sustainable local and regional food system. As part of the project, La Montanita leased a warehouse with 10,000 square feet of dry, refrigerated, and frozen storage. They also leased a refrigerated truck that picks up agricultural products from New Mexico and Colorado farmers and delivers local and other products to natural food stores, restaurants and institutions throughout the state. They work with farmers in two ways: either they buy the product from the producer and take responsibility for selling it to their customers or the producer interacts with the final buyer and pays La Montanita a transportation fee. La Montanita has recently begun to work with school districts to become a vendor. As part of the project, La Montanita also has an Enterprise Development Manager who assists producers in developing their product for market and finding appropriate outlets. The company can transport, store, and market local raw and processed products and also provides some training and support to farmers, ranchers and food producers. However, currently, the company is paying out more for this project than it is bringing in. Despite this, the company’s mission and long-term plan indicates strong commitment to the project. They have developed relationships with many farmers and buyers. They can both aggregate and disaggregate product to meet school needs. La Montanita is flexible and can respond quickly to new needs and opportunities. However, they have a limited delivery schedule (because they currently only have two trucks). Farmers do have to pay for transportation costs.

#### *Multidistrict cooperative buying*

Recently a group of 14 small school districts started working together to pool their orders to a major distributor. They did this to increase their buying leverage and to get volume discounts. While this strategy requires districts to be in close coordination, it does offer advantages: Districts get better prices, thus leveraging their budgets, and develop processes to work together cooperatively. However, they have not yet purchased perishable products such as produce, and this larger buying

pool may make it difficult for a very small farmer to sell the volume necessary.

### *Farmers deliver their produce to schools*

One farmer who is a member of the NM Apple Council delivers his product to the schools. In order to carry this product, he must rent a refrigerated truck (which is costly) and must deliver to as many buyers as possible in that one trip. This method allows the farmer to establish relationships with school warehouse personnel and the farmer is sure that the product is handled properly all the way to the buyer. However, the delivery costs are not built in to the cost of product (as agreed to and bid by the Apple Council). This farmer is GAP certified and all the other farmers are not, and he has not figured out how to mix his load with other farmers' products.

These individual innovations happen within a broader framework. FTT has continued to plan and develop farm to school distribution strategies by creating a steering committee and hiring a marketing specialist. (The committee created the job description and secured partial grant funding.) The steering committee developed a comprehensive grid of the local food purchasing potential for all New Mexico schools, including a list of the foods purchased by schools, price points, and overall potential demand (\$2-3 million in sales per year). The marketing specialist will focus on institutional sales, farmer education, and “untangling the distribution situation” existing in New Mexico.



Given the multifaceted infrastructure needs of rural communities, Farm to Table and its partners have envisioned the development of “rural food hubs.” A food hub would form around the existing assets of each community (e.g., a farmers’ market, a school, a food store) and expand to meet the remaining infrastructure needs. A food hub would bring together the many aspects of food production, processing, aggregation, and storage to maximize efficiencies, particularly with respect to distribution. It would also create a nucleus for innovation and community building around food. One producer has likened this idea to a revival of the trading post. By working with its many partners to increase the supply of and demand for local foods within schools, Farm to Table is contributing to this larger idea of food-based economic development. Strategic investments in rural food infrastructure combined with other efforts—working with farmers, school districts, students, and the makers of public policy—can help cultivate health and wealth in New Mexico’s rural communities.



## City Harvest (New York City)

City Harvest (CH) is a New York City-based non-profit organization whose core work for the past 25 years has been food rescue. City Harvest currently supports 600 community programs that together help feed 260,000 people a week. Each year, City Harvest secures and distributes about 20 million pounds of food, of which 60% is produce. City Harvest's food sourcing model includes donations of surplus food, reimbursements to farmers to cover the costs of harvesting their donated product, direct purchasing agreements, Community Supported Agriculture, linking food suppliers with new markets in New York City and creating demand for healthy food among recipients. As part of its mission to end hunger in NYC, City Harvest partners with the SchoolFood (the unit within the Department of Education responsible for NYC school meals), to enhance the school meal program so that more children participate in the program. Rates of participation in the school meal program are quite low, particularly for breakfast (averaging 22%) and in high school. SchoolFood and City Harvest believe that by improving the quality of the meals, more children will participate in the program.



Kristen Mancinelli, *City Harvest*

New York City is the nation's largest school district with more than 1.2 million students. Each day, more than 860,000 meals are served. For more than four years, SchoolFood has proactively sought to procure fresh and minimally processed regional foods. SchoolFood and City Harvest work together, and in concert with many other partners, to source regional foods when possible. Given the size of the system, even seemingly small purchases (e.g., bagged apples, carrot coins) can bring millions of dollars to farmers.

### *Background on the Status of Distribution Systems at the Beginning of the Project*

Following extensive analysis of a full year's purchasing data, distinct strategies were developed for purchasing fresh, frozen, and minimally processed fruits and vegetables from New York state growers. For example, a "local procurement team" worked extensively with Birds Eye Foods, a company based in Rochester, NY, to develop custom frozen vegetable blends that could be made with New York state-grown vegetables. By pursuing multiple strategies, the SchoolFood Plus Initiative, a collaborative project involving several different agencies, helped create a "laboratory for local procurement," experimenting with a variety of methods to increase the amount of locally grown foods entering the school system.

While SchoolFood has historically procured some locally grown prod-

ucts through its established distributors, it was impossible to quantify the volume of products or individual farmers associated with those items. Although the New York Farm to School Program has surveyed school food service directors about the use of local produce since it formed in 1998, tracking product origin has never been a priority within the food procurement accounting system. Furthermore, the local procurement agenda in New York City could not be realized by working with individual farmers. The scale of the school system, the existing procurement system, kitchen systems, and regional agricultural infrastructure and logistics make that approach unworkable.

City Harvest noted in its February 2008 distribution problem statement that a number of barriers would make it difficult for SchoolFood to change its procurement system to favor local farmers even if it was motivated to make the change. These barriers include:

- The state's farmers are limited by their growing season, which makes consistent, year-round supply of a large variety of fresh products impossible for many items.
- Few individual farmers could meet the system's large volume requirements.
- There is limited packing and distribution capacity in the region to meet the schools' specifications and logistics requirements.
- The chain of brokers and distributors generally puts the purchasing decisions outside the hands of the school system.
- Many produce items are frozen or processed to some degree.
- A relatively small quantity of products enter the system in their fresh, whole form. Distributors purchase fresh products by the case and then repack it according to each school's order, so that many deliveries of fresh produce are counted by the piece or small bag (not by the case). This significantly limits economies of scale that could be achieved with the local procurement strategy.

City Harvest felt that the role of a "public interest broker™" (who carries out the local procurement strategy of the public schools by working with the private sector) was clearly beneficial and necessary to ensure that the local food agenda is maintained. They argued that SchoolFood would have to adopt the role and develop a similar position. As an advocate and supporter, CH believed their role was to facilitate that transition, ensure food system education, and ultimately generate buy-in from SchoolFood and city officials.

### *Strategic Plan Development and Implementation*

When CH began their strategic planning process it became clear that, in New York City, the biggest barrier was not a lack of adequate distri-

bution systems but rather certain institutional weaknesses that prevent NYC's Office of SchoolFood from taking advantage of these systems. Specifically, SchoolFood never had the benefit of working collectively toward a common vision that was supported at all levels. A systematic approach to planning and programming did not exist.

City Harvest decided to engage in a full strategic planning process in Fall

2008 utilizing an outside firm, and engaged an advisory board of key stakeholders. The overall goal of the strategic planning process was to establish a vision and plan for achieving success for SchoolFood programs. Professional facilitators guided this process and produced a report with specific areas for improvement in SchoolFood programming. **City Harvest's Request for Proposal for a Strategic Planning Consultant/Facilitator is available on the CFSC website (<http://foodsecurity.org/deliveringmore>).**

The specific **long-term goals** that came out of the strategic planning work were:

- **Increase student participation in breakfast and lunch pro-grams.**
- **Improve quality of food, increasing the quantity of fresh and whole food and local food.**

The **short-term objectives** that were identified as next steps to advance toward the long-term goals were:

- **Expand or institutionalize successful pilots.**
- **Plan for future pilot implementation, expansion, and evaluation.**
- **Improve communication internally (within SchoolFood) and externally (between SchoolFood and external partners).**

Through the strategic planning process, City Harvest learned that SchoolFood achieves these goals in isolated cases through pilot programming in specific schools (~25-50), but has essentially no system in place for capitalizing on these successes and scaling them up to the entire school system of 1500 schools. It was therefore determined that the direction of City Harvest's strategic planning work would be to focus on developing a systematic approach, one focused on planning and evaluation, so that SchoolFood could roll out pilots, document their impact, and institutionalize those that are successful. Therefore, **the goal of the work shifted from development of new distribution systems and new pilots programs to focus instead on how to expand existing successful pilot programming to more schools.** Kristen Mancinelli of City Harvest sums up the lessons of this experience:

Although strategic planning is time intensive, it simply cannot be

skipped. Had we simply gone with the original plan to support development of new distribution models we would have been totally off the mark, and would likely have wasted much time and energy pursuing a strategy not likely to be successful. [The new strategy will] focus more on increasing political will, both within SchoolFood and among city government, for using local foods in schools.



To advance this agenda City Harvest interviewed SchoolFood staff about their pilot projects in order to create two products: 1) a pilot catalogue in which current pilots, their goals, criteria for participation, and implementation steps are described consistently, and 2) a project planning template that outlines a structure for planning for expansion. Both of these pieces will serve to improve communication both internally and externally, addressing one of the barriers to expanding and institutionalizing pilots and best practices. SchoolFood staff has already used the planning template, and the catalogue is intended to be posted to the web-

site. Perhaps the biggest barrier internally is the lack of consistency in SchoolFood's approach to its various programmatic components. The cataloguing process has highlighted this weakness and also provided the opportunity to suggest ways in which planning, programming and evaluation can be consistent across programs.

City Harvest has found that NYC's Office of SchoolFood has the ability to procure local product through its existing distribution system. The challenge to do so rests partly on the supply side with the lack of product origin traceability; and on the purchasing side with an institutional culture that aims for efficiency and cost-effectiveness and resists introducing potential disruptors into a well-functioning system. SchoolFood staff has said time and again that products can be procured locally through their existing system if there is sufficient will within the organization and a system set in place to do so. SchoolFood's current distribution system is highly efficient and effective at serving 1500 schools throughout five boroughs. It has become clear that, while alternative distribution systems can achieve pockets of success, a large-scale shift in institutional culture and a systematic approach to planning for these changes is key to developing a sustainable model of local procurement.

## Center for Food & Justice (Southern California)

Southern California is defined as stretching north to south from San Luis Obispo County to San Diego County, and also encompasses Los Angeles, San Bernardino, Orange, Riverside and Imperial counties. The Center for Food & Justice (CFJ) has worked on promoting farm to school and farm to institution programs in this region for ten years. CFJ has provided farm to school technical assistance and outreach to numerous schools, farmers, and farm to school practitioners across the country and now co-coordinates the National Farm to School Network with the Community Food Security Coalition.

Southern California is a vast, sprawling urban environment with a rapidly expanding population. Farms are most frequently located on the outskirts of the urban sprawl or on city edges. The northernmost and southernmost counties of the region (Riverside and Imperial) are home to its most fertile and rich agricultural lands, with about 350 miles separating them. Los Angeles County, however, has few farms in its core, and there are only 150 farms in Los Angeles County. Of these only 90 produce food on a commercial scale; most grow root vegetables such as potatoes, onions, turnips and beets. Of these 90, only 11 are certified organic producers. San Diego County has the second largest population of farms in the U.S., 63% of which are between one and nine acres, but also the sixth highest urban population among U.S. counties. Thus the number of sophisticated farm operations capable of supplying large markets alone in Los Angeles and San Diego are few. Densely populated Orange County has only one 100% organic farm operation and only a handful of conventional truck farms remain. Ventura County, to the northeast of Los Angeles, is one of the more diverse farm landscapes, with protected agricultural land, a greater diversity of crops grown, and more variation in farm size. San Luis Obispo County has a diverse range of crops and ranch lands as well as strong direct marketing and buy local campaigns. San Bernardino County is largely arid, but some agriculture does exist. Despite their desert landscapes, Riverside and Imperial Counties are rich agriculture landscapes with a diverse crop mix and large-scale export-oriented farms. Riverside County also has one of the most rapidly expanding populations in the nation, so agricultural land is under constant threat.

Due in part to CFJ's promotion of the farm to institution model, there has been considerable interest in the program from institutions around the region. At the beginning of the project, a minimum of three health care systems with at least 20 hospitals, and twelve school districts with

at least 200 schools were immediately interested in utilizing a local food distribution solution. CFJ fields frequent inquiries about local purchasing from schools and hospitals, and also conducts outreach to other institutions such as universities, elder care, child care, juvenile hall facilities and prisons. CFJ has also been working with the Los Angeles Unified School District (over 700 schools) to incorporate cafeteria-based improvements for several years, but was unsuccessful in promoting local purchasing for the entire school district due to lack of reliable distribution systems.



Vanessa Zajfen, Center for Food & Justice

### *Background on the Status of Distribution Systems at the Beginning of the Project*

The produce industry in Southern California is highly competitive, with companies popping up and disappearing overnight. It seemed that no single distribution model would be able to service each of Southern California's diverse markets and the range of geographic regions. Variations in clients' budgets, processing capacities, volumes of fresh produce purchased, and needs led CFJ to believe that no single solution would work and that a variety of models might be the most feasible solution. Thus far, institutions that are purchasing locally grown foods do so through a variety of channels including direct sales from farmers, farmers' markets, specialty distributors, and large conventional distributors.

The region is dominated by a few large distribution firms acting as institutions' primary food service providers. A number of these large distribution firms were interested in servicing institutions with local foods, and five or more Los Angeles-based firms already emphasized local or specialty food product lines. In addition, many small or boutique produce firms specialized in local foods sourcing from farmers' markets and farmers across the Southland (i.e., the Greater Los Angeles Area). Some of these firms already serviced Kaiser Permanente (medical facilities), school districts or other institutional clients interested in sourcing local. Therefore it was thought that some distribution firms could supply these clients with local foods; however, these product lines are still too expensive and inconvenient for institutions. These large distribution firms have a number of resources to establish local food specialty lines that are unavailable to local farmers or small produce firms, such as developed infrastructure, capital investment, marketing expertise, highly developed customer service and logistical skills. Unless these large produce firms make a concerted effort to engage in business with lower income clients while lower income clients attempt to modestly increase their food budgets, this distribution model will remain within its niche.

Additional distribution mechanisms and opportunities for the South-

ern California farm to school community include purchases at farmers' markets, smaller farmers' market sales, farm direct sales and Community Supported Agriculture<sup>1</sup> or other such produce programs.

Based on this assessment of the local food, farming and distribution mechanisms occurring in Southern California, the Center for Food & Justice has developed five strategies for scaling up the distribution of locally grown, processed and distributed foods in Southern California.

### *Strategic Plan Development and Implementation*

CFJ decided to expand upon its 2006/2007 exploratory research of local food distribution by participating in this project. They sought support through partnering with farm-based organizations to further develop the capacities of farmers to grow, handle and distribute local foods to institutional clients. CFJ recognized the need for enhanced local produce distribution systems in order to expand the farm to institution model throughout the region. CFJ identified numerous opportunities and barriers to developing and sustaining farm to school programs, specifically procuring, processing and distributing locally grown foods in dense urban landscapes such as Los Angeles. Recognizing these sourcing and distribution barriers, CFJ evaluated and identified strategies for scaling up the distribution of fresh locally grown foods to a wide variety of large institutions.

The overall mission of CFJ's distribution work is to "increase the popularity of farm to school programs and develop the capacity of Los Angeles food and farm based organizations to distribute locally grown foods to active and developing farm to school programs in the Los Angeles area." The three goals identified in their strategic plan are as follows:

- 1) **Engage larger distribution firms in developing regional distribution solutions for Los Angeles- based schools.**
- 2) **Engage and increase the role farmers' market associations and farmers' markets play in the distribution of regional foods to all institutions in the LA region.**
- 3) **Provide increased outreach and technical assistance to schools, distribution entities and other farm to school practitioners about ways to access good food in schools.**

To work toward these goals, CFJ developed several regional case studies identifying local food distribution models and capacity for four regions throughout Southern California. After studying the local food, farming

throughout the growing season.

and distribution mechanisms in Southern California, CFJ developed five strategies for scaling up the distribution of locally grown, processed and distributed foods in Southern California. Below is a brief outline of the five strategies they are working on implementing.<sup>2</sup>

1. The Local School Food (LSF) line is a concept for a new food product line to be carried by produce firms designed exclusively to market local foods (e.g., oranges, cherry tomatoes, or apples) to institutions and school food service directors by selecting food and food services that will specifically address the critical institutional barriers of inadequate kitchen and processing facilities, food costs and labor.

In November 2009, CFJ began to develop prototypes for their Local School Food line projects. The project being tested is "Harvest of the Month in a Box." They have identified a distribution partner and a

processing facility and have tested one round of the sourcing, processing and packaging of local food products. The plan is to refine the product further, identifying cost effective processing and packaging methods. They will also be developing a logo for the product as well as a supplemental nutrition and local food education tools that will be provided to participating schools free of charge.

2. Farm Direct Distribution Model, CSA in the Classroom provides schools with farm to school programming. Through years of experience implementing farm to school programs, CFJ has found that many schools and districts

have limited facilities, infrastructure, and administrative capacity to adopt a more comprehensive farm to school program. As a result, CFJ advises schools to take small steps towards the adoption of a comprehensive farm to school program in the cafeteria and classrooms. CSA in the Classroom is one such entry point for schools. The model creates a CSA relationship between a local farm and school with schools utilizing CSA boxes of local foods for classroom instruction and taste tests. A successful educational tool, CSA in the Classroom can also serve as an early step in developing a distribution model for a larger farm to school program.

3. The Women, Infants, & Children (WIC) Harvest of the Month (HOTM) retail program is designed exclusively to market local foods to WIC-only stores and WIC-only customers in L.A. WIC-only stores stock only WIC food items and serve only WIC customers. The WIC HOTM retail program will feature local food items that have been



<sup>1</sup> Community Supported Agriculture or CSA involves a direct link between farmer and consumer. The consumer usually pays a flat fee up front for a share of a farmer's produce

<sup>2</sup> These strategies are explained in further detail in CFJ's publications, "Food Access & Distribution Solutions: 5 Strategies for Southern California" and "Fresh Food Distribution Models for the Greater Los Angeles Region." Links to these publications are provided

in the Resources section.

selected to specifically address the issues of perishability, high food costs and limited food preparation facilities. **CFJ has successfully implemented this project; it has been up and running since May 2009.**

4. The Farmers' Market Hub or Regional Food Hub is an emerging model of local food distribution that calls for the development of permanent farmers' market structures to provide infrastructure and support systems necessary to address the systemic barriers that have limited small and midsize farmers' access to wholesale channels. These hubs would have the capacity to sell wholesale and retail local food products through the shared use of retail space (traditional farmers' market), wholesale business space, plus storage, packing, processing and other distribution infrastructure. They would be designed for small to midsize farmers and housed in a single location. The idea is to stack the functions of public, farmers' and terminal markets in one area.

5. The San Diego Growers' Project will explore ways to build sustainable regional food systems by building on-farm capacity and developing local distribution infrastructure so that farmers and distributors can meet the needs of larger food-purchasing institutions. A group of nine growers in the San Diego area, working with CFJ through the Tierra Miguel Farm Foundation, have submitted a USDA Value Added Producer Grant for funding to conduct a feasibility study for a Regional Food Hub.

CFJ has been able to conduct on-going feasibility analysis of L.A.-based distribution models designed to meet the local food needs of both farmers and institutions, and they have expanded their work to encompass all of Southern California. In their strategic planning about distribution strategies, CFJ has determined that two additional feasibility studies will be necessary: 1) a detailed assessment of distribution infrastructure in L.A., such as mapping of resources (processing facilities, warehouse space for local food distribution firms, companies buying/selling local food, looking at how the food physically moves through L.A.) and identifying major distribution players in L.A. that work with local food and also large institutions, and 2) a feasibility study to assess the viability of a Regional Food Hub (which would include significant distribution and some processing capacity for local small to medium size farmers) in Los Angeles. This feasibility study will also attempt to identify possible hub sites and evaluate their capacity to meet the four core requirements of a Regional Food Hub, looking at zoning requirements, building size needs to facilitate distribution and processing, required infrastructure and building improvements, and distance from food producers and customers.

This project assisted CFJ in identifying major constraints limiting local food distribution as well as identifying potential opportunities to increase local food distribution in the Southern California region. From this planning they were able to develop an implementation plan based on feasibility analysis and findings, and the work of CFJ has since re-

ceived major support from The California Endowment and the W.K. Kellogg Foundation to implement five strategies to address and leverage the barriers and constraints to local food distribution in Los Angeles. As noted above, they have successfully implemented one of the projects (the WIC-only program). The other four programs are in various phases of development.

# MEASURING PROJECT IMPACT: DATA AND REFLECTIONS

## *Evaluation of the Four Partner Organizations' Strategic Planning*

In order to evaluate the overall impact of the program on the four main partner organizations' work, CFSC developed a survey to collect data for each partner organizations' Farm to School Distribution project. The survey collected data across indicators requested by UPS as well as additional indicators that the partners felt were important. The topics covered in the survey include project details and geography; amount of local food sold to schools; project partners; and project planning and implementation strategies. Partners were also encouraged to add other relevant comments to their report. In addition to the surveys (which were given at the beginning of the project and each successive school year) partners hosted two evaluation debrief meetings (annually) during which the partners discussed the results and reflected on the relevance and impact of the data and on their lessons learned both individually and collectively.

The following information represents a summary of these results as well as observations and lessons learned by partners reflecting on the data. **For a comparison of results over the last three fiscal years, please see the *Partner Indicator Data, FY07 to FY09* in Appendix E and further details at <http://foodsecurity.org/deliveringmore>.**

### *Summary of Results*

The data results from each of the three years surveyed are complex and give the most insight when viewed in partnership with the specific program narratives. Over the three years of the project all four partners increased their farm to school distribution efforts significantly. Additionally, each project changed and modified its approach to respond to the various changing conditions in their area.

The strength of this report, therefore, lies heavily in the reflections provided by the partners explaining and interpreting the significance of the data. These factors will be explained in more detail below.

In general, the survey responses indicate a steady growth in farm to school distribution activities over the course of the project. The overall *recorded* number of students served and amount of local food provided increased by 50% at its highest impact point with a 29% increase in

the number of schools involved and a 61% increase in school district involvement. Partners also reported that *actual* amounts of local foods and diversity of foods increased significantly, with the value of food served multiplying 26 times. This increase only represents two of the four partners (because two partners were unable to track these figures over the course of the project). The amount of partner engagement increased significantly to over 300 partners, with farmer and distributor relationships showing the most significant increases. One partner doubled the number of schools working directly with local distributors.

The specific characteristics of each project's region and school systems contributed to unique circumstances and results that are often difficult to compare. For example, some partners (FTT, ASAP) developed their farm to school initiatives out of smaller, existing food system projects that include many partners. They often work directly with farmers and have complex relationships and very focused impact. One of those partners (ASAP) is also closely linked with a Department of Agriculture local food distribution initiative and has difficulty separating out the causation of impacts.

A third initiative (CH) came directly from New York City's Office of SchoolFood, which often works with single items through distributors and has more direct (purchasing bulk) relationships and broader impact. Their work was initiated as a way to bring together over a dozen partners to streamline their farm to school efforts. The final initiative (CFJ) works mostly with schools in a technical assistance capacity, assisting them in assessing their farm to school needs and capabilities and in connecting them with needed resources. Because of their capacity-building role, their ability to collect data from the many farm to school projects that they support is limited.



These differences in approach and impact demonstrate the flexibility and range of strategies while reinforcing the value of farm to school projects in furthering a broad range of goals. Furthermore, the highest increase in impact data was in year two, while year three showed a steadying (rather than growing) of impacts. Partners felt this reflected the nature of a project in its third or fourth year where energies are invested in focusing in on proven strategies, strengthening partnerships, and maintaining complex systems established in the early stages of development. Finally, while the data collected creates a snapshot of particular impacts, it is strengthened and informed by the complex stories of project activities.

Overall, project partners learned from each other through a deepened understanding of each project's details, gleaned ideas about overcoming obstacles and being inspired by each project's successes. Additionally, partners shared insights and built relationships among a broader

set of participants in the Farm to School Distribution Learning Community both as a group and through one-on-one contacts.

### *Data Analysis by Topic*

#### *Project Details and Geography*

The scope of each project varied greatly depending on unique regional circumstances. For example, CH works with one school district (New York City) that includes over one million students, 43,000 of whom are specifically targeted for farm to school efforts, while CFJ works with 13 school districts with less than half that number of students, 20,000, directly involved. Overall, the number of students involved increased from 186,799 students involved in year one (collectively across four projects) to 256,879 involved by year three.

The geography of the projects was varied with some densely urban and some spread out in rural areas. For the most part, partners maintained the scope of their projects in terms of the geographical impact throughout the three years. While some projects have a large number of schools, these may be reflective of single item products being brought into the schools (like apples with CH and FTT) compared to more complex involvement with fewer number of schools (as with CFJ and to some degree ASAP).

Additionally, projects in rural areas reported less formal distribution efforts relying heavily on small family or farmer owned distribution systems with a less centralized infrastructure. In more populated urban areas, distribution relationships are more formal, competitive, and include more centralized distribution infrastructure.

ASAP shifted the way they calculated their geographical impact from identifying five county areas to identifying 23 towns or cities within which they work. CH works specifically in three densely populated urban areas of NYC. FTT covers the broadest geography (over 13,000 square miles) including 10 cities with smaller populations. CFJ works with 11 cities ranging in density from Los Angeles to the San Juan Capistrano area.

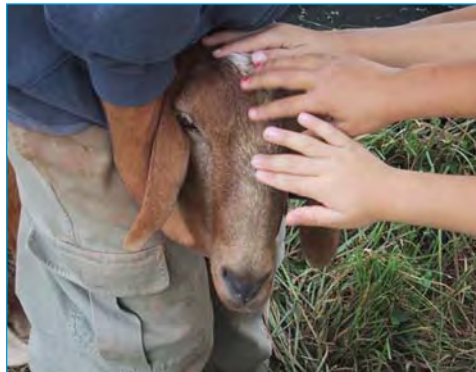
#### *Local Food Sold to Schools*

The amounts of local foods and diversity of foods increased significantly over the three years from an estimate of \$173,000 worth of food in year one and \$4,671,210 worth in year three. The data for the overall dollar value of local food purchased in year three was provided by two of the four partners. For both partners reporting dollar amounts (CH over \$4.4 million and FTT at \$250,000) the majority of dollars represented the purchase and distribution of local apples.

Of the two partners who did not have specific data (ASAP, CFJ), both reported a significant increase in farm to school activities and technical assistance but didn't have the resources to collect data from the individual schools receiving outreach.

Partners also tracked the number of schools who purchased directly from farmers (336 at the height) and the number who purchased from distributors (280 at the height). Two programs (ASAP & CH) purchased almost entirely from distributors. One program (FTT) purchased entirely direct from growers. The final partner, CFJ, did not have this data.

The overall amount of funds leveraged for these projects varied over the three-year period. The total amount leveraged across programs was \$5,868,000 at its height in the first year of the project.



#### *Project Partners*

Overall the number of partners increased by 67% from year two to year three (this data was not collected in year one) with a recorded 348 total partners. The major increase in types of partners was farmers (both small and large) whose numbers more than doubled (up to 174 farmer partners). Each project utilizes partners in different ways. ASAP has a range of project partners and works collaboratively with complex relationships. They also developed a significant partnership in year three of the project with a state local food campaign. CH and CFJ work mostly with other non-profit groups building relationships among their network. FTT works directly with many farmers, food service providers and other agencies and organizations.

While one partner has significant funding to implement their work (CFJ), others rely on a strong network of partners (ASAP, CH, FTT).

#### *Project Strategies*

Two partners (ASAP & CFJ) completed the bulk of their strategic plan activity in FY08 and showed no change in this area for FY09. Their work, however, continued to grow, and both organizations cited a focus in their approach that evolved from previous years' experiences.

The remaining two partners (CH & FTT) made progress in implementation of their strategic plans in 2009—CH in three of the four areas tracked and FTT in two of them. Additionally, both of these projects utilized FY09 to increase effectiveness of the strategies previously in place. FTT, for example, reported significant benefits from their work with a distribution coop and CH reported significant benefits from strengthening the work of various pilot projects already in place but not well coordinated.

Strategic plans have been approached with different models of various complexity. In FY09, partners utilized their strategic planning process to address specific challenges, to hone in on proven strategies, and to explore newly emerging strategies.

### Survey Limits

Given the complexity of each farm to school project, the ability to track significant project and distribution data is limited by various factors. These factors include assumptions for data collection (assuring that each partner is interpreting and counting data similarly); partner relationships (collecting data from partners who do not implement tracking systems); lack of industry tracking (few crops have industry tracking systems like the one used for apples); and the grassroots nature of these efforts.

### Additional Lessons Learned

In addition to the lessons learned outlined throughout this report, partners commented on the significant increase in interest around the country in farm to school efforts. To respond to this growing interest, partners recognize the importance of well-established programs with solid infrastructure and distribution systems. In this way, their work has set the stage for demonstrating effective farm to school efforts to a broad range of programs. Partners agreed on the benefits of working with distributors to scale up the impact of farm to school efforts and of focusing on the practicalities for farmers to make these projects successful. In addition, partners felt it important to emphasize the diversity of responses to scaling up distribution efforts. There is no one-size-fits-all approach to farm to school. The dynamic relationships and networking efforts are significant tools that help broaden the way each group can envision potential strategies for their unique set of circumstances.

### Evaluation of the Learning Community Activities

The learning community activities were evaluated through on-line surveys. In evaluating the October 2008 short course (developed for the learning community participants and other farm to school practitioners), participants indicated that sharing successes, challenges, and ideas for solutions with other farm to institution practitioners was a very valuable part of the short course. After the short course, participants received notes, PowerPoint presentations, and other materials related to the program.

The effectiveness of the learning community conference calls were evaluated through two on-line surveys. Of the 20 learning community participants who responded to the June 2008 on-line survey, 56% indicated the learning community calls increased their understanding

of factors that hinder and help distribution of local products to area schools well, 28% very well, and 17% okay. Fifty-three percent indicated they expected to apply what they have learned during the Farm to School Distribution Learning Community calls in planning, developing or modifying their distribution system a good bit, 26% a little,

and 16% very much. When asked to name the benefits of participating in the learning community, most indicated the opportunity to network with others facing similar challenges and opportunities and to learn about other programs and resources.

Of the eleven learning community participants who responded to the August 2009 on-line survey, 60% indicated the learning community calls increased their understanding of factors that hinder and help distribution of local products to area schools well, 40% very well. Sixty-four percent indicated they expect to apply what they have learned during the Farm to School Distribution Learning Community

calls in planning, developing, or modifying their distribution system a good bit, 18% a little, and 18% very much. When asked to identify the benefits of participating in the learning community, most again indicated the opportunity to network with others facing similar challenges and opportunities and learn about other programs and resources. When asked to offer suggestions to improve future Farm to School Distribution Learning Communities that CFSC may organize and facilitate, responses included the following:

- Keep having the calls and maybe more often.
- Continue with the combination of in-person sessions, reinforced by the conference calls.
- Continue to have contact information for the speakers and power points available to those on the call.
- Offer feedback on topics for discussion more regularly.
- Host webinars.
- Bring in some of the main line type of distributors to find out how they tick.
- Include some models that address the need for minimally processed foods (i.e., include processing as part of supply chain development).
- Hold a call that focuses on food safety issues, certification requirements and innovative or farm-supportive methods of assuring safe food supply.
- Have the calls more focused and specific around distribution issues, i.e., this is the purpose of the call and you should be getting [fill in the] blank out of it.

Participation and informal feedback from the learning community calls, the October 2008 short course, and the March 2009 National





Farm to Cafeteria conference field trips and workshops indicated these were successful outreach forums for educating other farm to school advocates in the nuts and bolts, challenges, and ‘strategies for success’ in developing strategic plans and distribution infrastructure for farm to school programs.

### *Reflections and Implications*

Strategic planning, by its nature, takes a long-term view. No one can know all the answers, or even all the right questions, at the outset. The first step is to generate commitment to building for the future, and that commitment is evident in the responses to this project. Le Adams of Farm to Table puts it this way: “Going through this process has been eye-opening for me, mostly by making the planning so real to me, focusing on the subject most dear to my heart and not in an esoteric way.”



The partners’ reflections about their work on the project bring out several lessons related to strategic planning as a long-term process. One lesson is the importance of forming strong relationships. For example, Emily Jackson of ASAP notes, “We have included partners throughout the strategic planning process and we would spend more time in the future trying to bring as many partners into the fold at the very beginning. It is hard to bring folks up to speed if they haven’t been involved since the beginning and they lack the buy-in that the original partners have.” Another lesson is the need to analyze, not just act—a point that is clear in the comments of Kristen Mancinelli of City Harvest: “Although strategic planning is time intensive, it simply cannot be skipped. Had we simply gone with the original plan to support development of new distribution models we would have been totally off the mark, and would likely have wasted much time and energy pursuing a strategy not likely to be successful.”

Creating a strategic plan based on input from multiple stakeholders is a necessary first step in the process of scaling up a farm to school program. Long-term follow-through is essential. The results so far suggest that making major changes in long-established distribution systems requires several years of focused effort. Making those changes will likely require skills and aptitudes different from those used to start a program. Farm to school programs will need to figure out how to make larger scale distribution models work for all involved. The biggest changes—the development of new infrastructure, the designing of new models for distribution—will require considerable time and investment, and will likely involve a process of trial and error. Because so many factors are involved in the success of a farm to school program over time, scaling up distribution efforts will be a dynamic, unpredictable, and complex process requiring creative and cooperative thinking.

What can other farm to school programs learn from the experiences of the four programs involved in this project? When asked in a survey what they found most valuable about the project, all of the partners mentioned the value of networking, which helped them see how their particular challenges related to challenges elsewhere. They appreciated the chance to learn from their professional peers and looked forward to using the resources and contacts that they established to ask for more information and help in the future. Some talked about the skills they

developed for communicating with different audiences. Some singled out particular lessons that they use to help them communicate more effectively. For example, one noted that just telling institutions that they have the power to influence distributors is not as persuasive as illustrating that point with examples from Parkhurst Dining’s experiences. Engaging in a process of planning and networking can have direct and indirect benefits. Those benefits may not

be measured quickly and easily, but they will accrue over time as they lead to new projects, partnerships and initiatives—and to new learning about effective ways to scale up farm to school efforts.

# RESOURCES

## *National*

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Community Food Security Coalition: [www.foodsecurity.org](http://www.foodsecurity.org)

National Farm to School Network: [www.farmtoschool.org](http://www.farmtoschool.org)

National Farm to College Program: [www.farmtocollege.org](http://www.farmtocollege.org)

## *Appalachian Sustainable Agriculture Project*

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[www.asapconnections.org](http://www.asapconnections.org)

The NC Farm to School Program:

<http://www.ncfarmtoschool.com/htm/about/history.htm>

For more information on *Appalachian Grown*:

<http://www.asapconnections.org/appalachiangrown.html>

## *Farm to Table*

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Farm to Table

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## *City Harvest*

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## *Center for Food & Justice*

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[www.uepi.oxy.edu](http://www.uepi.oxy.edu)

[www.foodandjustice.org](http://www.foodandjustice.org)

Food Access & Distribution Solutions: 5 Strategies for Southern California:

<http://departments.oxy.edu/uepi/cfj/Modelwrite-up.pdf>

Fresh Food Distribution Models for the Greater Los Angeles Region: Barriers and Opportunities to Facilitate and Scale Up the Distribution of Fresh Fruits and Vegetables:

[http://departments.oxy.edu/uepi/publications/TCE\\_Final\\_Report.pdf](http://departments.oxy.edu/uepi/publications/TCE_Final_Report.pdf)

# APPENDIX A:

## Appalachian Sustainable Agriculture Project Documents

*Appalachian Sustainable  
Agriculture Project  
Farm to School – Distribution  
Problem Statement (February 2008)*



**What we're doing now:** We currently have a group of farmers (Madison Family Farms) that are growing, selling and distributing their food products to six K-12 schools in their own county (spread out over 450 square miles). They also serve nine K-12 schools in a neighboring county that is 30 miles away (and this school system is within the Asheville city limits, an area of 40 square miles).

Individual farmers serve two other small, rural, mountainous communities (Mitchell and Yancey Counties – each have approx. 2500 K-12 students). In Yancey County, the school system has their own truck that they send out to the farm to pick up the farm product. In Mitchell County, the farmer delivers to each of the eight schools.

**How we'd like to expand operations:** Where our problem lies is with new farmers that might be interested in this market and lack the coordination of Madison Family Farms or the school system is too large for a farmer to deliver to each. Other school systems that are interested in farm to school are: 1) Buncombe County Schools, 40 K-12 schools of approximately 25,000 students. Buncombe County is a large, mountainous county that spans 656 square miles; 2) Henderson County 374 sq. miles, 21 schools, 12,400 students, and 3) Haywood County 554 sq. miles, 15 schools, 10,000 K-12 students. We would also like to expand the potential for farm to school production and distribution in Yancey and Mitchell counties (that are now being served by just one farmer). Other information that we would like to investigate more thoroughly - What existing distribution networks already exist that could be engaged in farm to school or what would it take for these entities to participate? If delivery is not possible to each individual school, what could be put in place that would serve the schools and farmers? What is the current infrastructure in the individual school systems to manage distribution (do they have central warehouses, trucks/drivers to go to the farm, etc.) and how can farmers meet the distribution needs of such diversity? What role can DoD (or Foster Caviness, private produce distributor that has taken over the NC farm to school program) play?

**What are the constraints on expansion that we're facing?** The issue of distribution for farm to school in western North Carolina is complicated by the mountainous region that is also predominantly rural. Many school systems cannot get food distributors to even place a bid because

of the small sizes of the schools and how far apart they are. In the more rural areas (not Henderson, Buncombe or Haywood mentioned above), the school systems (K-12) are approximately 2500 students, on average six to nine schools in each system and range in size of land area between 221 and 312 sq. miles. Other constraints include: a strong local food movement that has created/expanded profitable markets for farmers that eclipse the market potential of school systems, confusion of local program vs. state program; and size of farms (too small or too large).

**Volume of product needed to feed x number of school children in a specific geographic region:** Below is a typical weekly distribution to one school system of 2500 children:

<i>12 bu. white potatoes</i>	<i>20 cases 14 count broccoli</i>
<i>12 cases slicer tomatoes</i>	<i>8 bags 50 lbs green cabbage</i>
<i>12 flats cherry tomatoes</i>	<i>30 lbs red cabbage</i>
<i>30 lbs yellow squash</i>	<i>60 lbs cucumbers</i>
<i>30 lbs zucchini squash</i>	<i>12 gallons blue berries</i>
<i>40 lbs bell pepper</i>	<i>40 watermelons</i>
<i>14 cases Bibb lettuce</i>	<i>80 cantaloupes</i>

# STRATEGIC PLAN FOR APPALACHIAN SUSTAINABLE AGRICULTURE PROJECT

## For UPS Strategic Planning Process - 2007 to 2010

Overall Mission: To utilize existing systems when possible, build farmer capacity to meet institutional market requirements, and to promote local agriculture in western NC and the southern Appalachians (and throughout Kentucky, Tennessee, North Carolina, South Carolina, Georgia and Florida as the Southeast Regional Lead Agency for the National Farm to School Network).

GOAL 1	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETED OR IN PROCESS	PROJECTS
<b>Build partnerships with area distributors and their awareness of Appalachian Grown (AG) program</b>	<ol style="list-style-type: none"> <li>1) Continue outreach to identify and develop relationships with area distributors</li> <li>2) Assist distributors with identifying local growers</li> <li>3) Solicit info from distributors re: farmers they currently work with</li> <li>4) Develop distribution plans with small and regional distributors</li> <li>5) Assess farmers' satisfaction working with distributors (price they're getting, quantities purchased, payment made, etc.)</li> <li>6) Provide training and technical assistance to area farmers to meet the requirements of distributors</li> <li>7) Create partnership with regional distributors for the benefit of the larger SE region (of the National Farm to School Network)</li> </ol>	<ol style="list-style-type: none"> <li>1) Number of distributors certified as Appalachian Grown handlers</li> <li>2) Number of connections/meetings between farmers and distributors</li> <li>3) Farmers certified as AG</li> <li>4) Local food lines developed</li> <li>5) Number of farmers that continue to market their products through distributors in 2010</li> <li>6) Number of farmers trained (through one-on-one or at ASAP workshops or ASAP Marketing Opportunities for Farmers annual conference</li> <li>7) Number of states/school systems in SE that show interest in working with local distributors</li> </ol>	<ol style="list-style-type: none"> <li>1) Two distributors certified AG handlers; two still need to be and outreach needed to gauge interest from two more (on-going as more distributors identified)</li> <li>2) Several AG farms already working through area distributors, continue to identify others as new distributors identified</li> <li>3) Contact made with new farmers</li> <li>4) US Foods shown interest in developing local food line; Carolina Produce developed USDA Fresh Fruits and Vegetables Program line for a school system</li> <li>5) Farmer meeting to take place winter 2009</li> <li>6) On-going and conf. Feb. 2010</li> <li>7) SE F2S meetings (info provided at recent KY and TN state meeting and this will be focus for FL state child nutrition directors meeting in Oct. 2009)</li> </ol>	<p>Appalachian Grown certification program (group and individual farmer meetings, outreach to distributors, contact with farmers through efforts of Local Food Guide and Mixing Bowl, distributors identified through F2S program and F2Hospital program) ASAP as Regional Lead Agency for the National Farm to School Network (state and national meetings and conferences)</p>

GOAL 2	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETED OR IN PROCESS	PROJECTS
<p><b>Build capacity of farmers to meet demands and requirements of distributors</b></p>	<ol style="list-style-type: none"> <li>1) On farm visits to determine farmer capacity to meet distributor requirements</li> <li>2) Assess satisfaction of farmers currently working with distributors</li> <li>3) Provide SARE research on F2S market to farmers and area lending agencies (Carolina Farm Credit)</li> <li>4) Build awareness of ASAP's marketing cost share program</li> <li>5) Assist farmers in developing business plans for a variety of distribution models</li> </ol>	<ol style="list-style-type: none"> <li>1) Number of farm visits</li> <li>2) Number of farms that continue to work with distributors</li> <li>3) Number of farmers that use info to create business plans</li> <li>4) Number of farmers that take advantage of cost share funds</li> <li>5) Number of business plans created and implemented</li> </ol>	<ol style="list-style-type: none"> <li>1) On-going</li> <li>2) On-going</li> <li>3) Report complete by Nov. 2009 and disseminated</li> <li>4) Cost share mailing went out July 2009</li> <li>5) Re-connect with Carolina Farm Credit to set up business planning meeting(s)</li> </ol>	<p>Appalachian Grown and F2S programs</p>
<p><b>GOAL 3</b></p> <p><b>Develop plans to work with state F2S program</b></p>	<p><b>IDENTIFIED ACTION</b></p> <ol style="list-style-type: none"> <li>1) Meet with North Carolina Department of Agriculture (NCDA)</li> <li>2) Outreach to farmers to gauge interest in state farm to school program</li> <li>3) Explore potential of refrigerated warehouse to meet the needs of farmers and NCDA</li> <li>4) Interview farmers and NCDA re: summer pilot project (use of Western NC farmer cooperative to provide food products for summer feeding programs)</li> </ol>	<p><b>OUTCOMES TO EVALUATE</b></p> <ol style="list-style-type: none"> <li>1) Gauge interest of NCDA to work with small, Western NC farmers</li> <li>2) Number of farmers that respond</li> <li>3) Commitment of NCDA to utilize facility</li> <li>4) Assess summer pilot project to determine feasibility for summer 2010</li> </ol>	<p><b>ACTIONS COMPLETED OR IN PROCESS</b></p> <ol style="list-style-type: none"> <li>1) Document requirements of state F2S program</li> <li>2) Provide information to farmers and connect farmers to NCDA</li> <li>3) Convene meeting of farmers and NCDA at warehouse facility</li> <li>4) Document farmers' experience with pilot and NCDA perspective</li> </ol>	<p><b>PROJECTS</b></p> <p>NCDA F2S program and Storehouse Project</p>

## APPENDIX B: Farm to Table Documents



*Farm to Table*  
*Farm to School – Distribution Problem Statement*  
*February 2008*

**What we're doing now:** Farm to Table ran farm to school education activities, mostly in Santa Fe, for approximately 5 years. Also, we have designed and run snack programs in various schools in two districts. We have worked and continue to work on policy changes that improve the way children are eating in school environments. Recently we have renewed energy to 'spread the word' about farm to school generally throughout the state by conducting surveys of farmers and food service directors, publishing a Directory of the survey information, publishing a general booklet about farm to school in New Mexico, producing a farm to school video for general dissemination, and developing a school fundraiser project which is made up of local agricultural products. We applied to CFSC and CFJ for funding to become the regional lead agency for the National Farm to School Program for 5 states in the southwest (Wyoming, Utah, Colorado, Arizona, and New Mexico) and were awarded that position.

We have been working on one farm to school project at a time, generally with no strategic planning involved. This usually involved working with which ever group seemed the most insistent or in the arena that had funding involved.

**How we would like to expand operations:** To continue on with the theme of that one strategic planning session, we would like to really have a plan of action for each of the communities that we work with. This would include research to really understand the farm to school potential and existing programs; training and networking sessions for local farmers and school food service and other personnel; and, development of pilot programs to get each one of those communities working to provide healthier local fresh fruits and vegetables for their children. These community programs would also tie into the FTS Regional Lead Agency work, include an evaluation component, sharing with others (replicability), and include awareness of sustainability issues.

Some of the major problems facing FTS in New Mexico are that farms are so spread out and that farmers do not have a history of working well together in co-operative systems. Developing a collaborative model for farmers for brokering, transportation, and minimal processing has been a dream for Farm to Table for several years now. How doable is this

model? Who are the players? Who is distributing and processing now? What really are the needs of local farmers for infrastructure and brokering? Is this model forming now? Is there a way that we can take its development up a notch? And how intimately involved should or could a non-profit educational organization such as Farm to Table be in the development of such a venture?

**What are the constraints on expansion that we're facing?** One very powerful distributor services most of the school districts; food service doesn't see the need to go out of their way to order from anyone else; status quo is a lot easier than doing something unusual; lack of farms, farm product and/or lack of knowledge that this market may exist; our very independent farmers do not have a history of working well in a cooperative arrangement; distance between the farms and the buyers and rising price of fuel; school food service is constrained by very tight budgets; how to introduce and fund concomitant education programs; and, schoolchildren and their families do not have a background of eating or cooking with truly fresh foods. Also repeated.

**Volume of product needed to feed schoolchildren for a specific project:** This example is of a project that is on the ground now: It is a combined snack and lunch-addition program, a fresh fruit or vegetable snack once per week, early afternoon on Friday and a lunch meal addition on Tuesday. For 12 schools: 8 Elementary, 2 middle schools, and 1 high school, total enrollment 5,830. This area is known as the Valley Cluster, part of Albuquerque Public Schools and located in the North Valley of Albuquerque. The money that we have is approximately \$70,000 or \$12 per student. Delivery is to one location, one time per week. Maximum delivery distance is 200 miles one way. In order to provide one snack of locally available food in season, we have estimated the following needs for this number of students per item:

*Apples - 50 cases of 138 count boxes*  
*Pears - 90 cases of 80 count boxes*  
*Peaches - 90 cases*  
*Table Grapes - 1,500 pounds*  
*Watermelons - 200 melons*  
*Cantaloupes - 800 melons*  
*Carrots - 300 pounds*  
*Cucumbers - 1,000 pounds*  
*Cherry Tomatoes - 1,200 pounds*  
*Zucchini Squash - 900 pounds*

Questions: Are these the proper amounts per serving? What is the most realistic price that can be bid per item? How many servings can be provided for the \$12 per student? Can we include a fee for delivery to the farmer in this scenario? If so, how much should that be? What are other associated costs and what are they for (ie, Ranch dressing)?

# STRATEGIC PLAN FOR FARM TO SCHOOL IN NEW MEXICO - 2009 & 2010

GOAL	IDENTIFIED ACTION	BENCHMARKS	PROJECTS THAT SATISFY GOALS
<b>Better Agricultural Production: Increase year round supply and high quality produce for sales to schools</b>	<b>1) Outreach and Education:</b> a) Introduction of Farm to School, institutional marketing and distribution  b) Outreach to new potential growers  c) Offer training to farmers and create connections  d) Develop relationships and access to existing farm credit and insurance	a) How many presentations, how many people in sessions, where are the presentations  b) Increased number of farmers receiving 'certification' to sell to schools  c) Increased sales to schools by existing farmer-vendors <ul style="list-style-type: none"> <li>• types of crops</li> <li>• pounds of crops</li> <li>• money spent on these crops</li> </ul> d) How many farmers have the required product liability insurance? Do they need assistance for that?	a) Southwest Marketing Network (SWMN) conference sessions, email and other communications, School Nutrition Association (SNA) annual meeting presentation, several other national, regional and local presentations.  b) Research, surveying, farm tours and farm visits. Developing "Benefits of Ag in NM Report".  c) Received 3 new grant funds and applied for an additional one which will provide resources and structure for farmer trainings.  d) Charting farmers and their 'attributes', including existence of insurance and many other details. Research on available insurance.
	<b>2) Specialized trainings:</b> a) Good Agricultural Practices (food safety) b) HAACP training c) Frost Protection d) Pruning e) Season Extension f) Quality Control  <b>3) Certification Assistance (ie, GAPs)</b>	g) Packing /Grading h) Labeling i) Business, record keeping j) Distribution options k) crop diversification	Number and location of sessions. <ul style="list-style-type: none"> <li>• people involved</li> <li>• crop type represented.</li> </ul>

# STRATEGIC PLAN FOR FARM TO SCHOOL IN NEW MEXICO - 2009 & 2010 (CONTINUED)

GOAL	IDENTIFIED ACTION	BENCHMARKS	PROJECTS THAT SATISFY GOALS
<p><b>Better Post Harvest Handling</b></p>	<p><b>ORGANIZATIONAL DEVELOPMENT:</b></p> <p><b>1) NM Apple Council (AC)</b>                      a) Strategic planning for Apple Council and update past feasibility study.                      b) Set up procedures and options for additional growers.</p> <p><b>2) Other farmer groups</b>                      Development, coordination, ongoing assistance</p> <p><b>3) Hire full-time broker</b>                      a) To work with any farmer or farmer group</p>		<p>Investigating legal issues.                      Determination made to not include vegetables unless they are grown by an AC member (ie, a fruit grower)</p> <p>With new 'scaling up' projects, part of the training includes peer networking and peer mentoring. We believe that farmer group development may flow from that project.</p> <p>FTT hired a marketing specialist whose main work is in value chain methodology. This person will be working to increase sales to institutional buyers.</p>
	<p><b>INFRASTRUCTURE DEVELOPMENT:</b></p> <p><b>1) Develop on-farm infrastructure to meet growers' needs for institutional sales</b>                      a) Quality Control                      b) Grading, packing, &amp; storage facilities                      c) Packaging, labeling standards                      d) Distribution plan, including storage depots</p>		<p>Some training, site visits</p> <p>We have held meetings and discussions on the development of storage depots that will serve to consolidate product for a number of buyers, schools included. Five communities have expressed interest in this idea. More directed action needed.</p>



## STRATEGIC PLAN FOR FARM TO SCHOOL IN NEW MEXICO - 2009 & 2010 (CONTINUED)

GOAL	IDENTIFIED ACTION	BENCHMARKS	PROJECTS THAT SATISFY GOALS
<p><b>Increased Marketing and Distribution of products to schools</b></p>	<p><b>MARKETING: CURRENT AND ADDITIONAL MARKETS</b></p> <ol style="list-style-type: none"> <li>1) Review product list, needs, sales of current schools and school districts</li> <li>2) Review and report from Valley Cluster Project</li> <li>3) Bid process transparency &amp; education</li> <li>4) Match farmer crops with school needs</li> <li>5) Develop &amp; share how to information</li> </ol>	<p>Number of new school districts and farmer commitments, pounds sold, Value of sales Current Successes</p>	<ol style="list-style-type: none"> <li>1) Statistical analysis - We took 18 months of product specific sales data from APS, our largest school district. Extrapolated the data out to all school children in the state who eat school meals to estimate the potential sales of 19 different products if purchased from local (statewide) growers. That ticket is close to \$2M.</li> <li>2) Continue to work with Valley Cluster personnel to acquire new product and deal with any supply issues.</li> <li>3) Made open bid on 11 items to APS for the coming school year. This bid will help as yet unidentified or not finalized first-time vendors get into the school system for the first time. (The bid was approved. Various products have been sold through that bid).</li> </ol>
	<p><b>DISTRIBUTION OF PRODUCT:</b></p> <ol style="list-style-type: none"> <li>1) Analysis of current distribution picture</li> <li>2) Plan for a full time broker</li> <li>3) Hire full time broker</li> <li>4) Expand distribution options</li> </ol>		<p>A part-time marketing specialist has been hired by FTT. She is focused on value chain work, is analyzing the current distribution picture, and is working to expand distribution options for a variety of crops and buyers.</p>

## STRATEGIC PLAN FOR FARM TO SCHOOL IN NEW MEXICO - 2009 & 2010 (CONTINUED)

GOAL	IDENTIFIED ACTION	BENCHMARKS	PROJECTS THAT SATISFY GOALS
<p><b>Increased consumption of local fruits and vegetables by schoolchildren</b></p>	<p><b>OUTREACH TO INFORM ABOUT FTS OPPORTUNITIES AND TECHNIQUES, TO SCHOOL COMMUNITIES</b></p> <ol style="list-style-type: none"> <li>1) Contact with new school districts</li> <li>2) Continue relationships with schools already in program                             <ol style="list-style-type: none"> <li>a) farm field trips for school food service, students, others</li> </ol> </li> <li>3) Introduce farms, farmers, products.                             <ol style="list-style-type: none"> <li>a) farm field trips for school food service, students, others</li> </ol> </li> <li>4) Review menus and determine replacements and needs from special programs that could be available from NM farms.                             <ol style="list-style-type: none"> <li>a) List of available products and farms able to supply.</li> <li>b) Supply product availability updates.</li> </ol> </li> <li>5) Secure timely distribution of products: quality, packaging, documentation                             <ol style="list-style-type: none"> <li>a) Field calls, check for quality and for the meeting of expectations, customer satisfaction interviews</li> </ol> </li> <li>6) Farm to School education</li> <li>7) Develop a self-sustaining FTS Network</li> </ol>		<ol style="list-style-type: none"> <li>1) Coordination with SNA. Exploratory trips to 6 districts - 709.</li> <li>2) Valley Cluster work with APS. Outreach to all 42 school districts that have new schools in the USDA Fresh Fruit &amp; Vegetable Snack Program.</li> <li>3) One farm field trip for grantors.                             <ol style="list-style-type: none"> <li>a) continuing to update our existing directory.</li> </ol> </li> <li>6) Two different teacher level “train the trainer” events - 709. “Benefits of Ag in NM Report” will educate the general public.</li> <li>7) Creating ideas and techniques for this, which will also include mapping capability.</li> </ol>

# STRATEGIC PLAN FOR FARM TO SCHOOL IN NEW MEXICO - 2009 & 2010 (CONTINUED)

GOAL	IDENTIFIED ACTION	BENCHMARKS	PROJECTS THAT SATISFY GOALS
<p><b>Additional policy change, structural change, resources. (These resources and activities affect all aspects of this Plan)</b></p>	<p>Increased funding for purchase of local fresh fruits and vegetables, special programs.</p> <p>Develop priorities and fight for Child Nutrition Reauthorization (CNR) Bill changes</p> <p>Increased funding for school food service, state subsidy for food, labor, equipment</p> <p>Hire Farm to School Specialist in NMDA</p>		<p>Continuing work on Healthy Kids Healthy Economy state legislation.</p> <p>Working closely with Community Food Security Coalition's actions on CNR and on food safety issues.</p> <p>Working with Fresh Fruit and Vegetables Program (FFVP) schools this year - 66 schools in 42 districts.</p> <p>An additional 'sales to institutions' person has been hired by the New Mexico Department of Agriculture (NMDA), Marketing Division.</p>

Plan prepared and organized by a team of people, including Le Adams, Farm to School Director of Farm to Table and Southwest Regional Lead Agency of the National Farm to School Network. Recently adjusted - September 2009

Your questions and comments are encouraged.

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# APPENDIX C:

## City Harvest Documents

### City Harvest

#### Farm to School – Distribution Problem Statement

February 2008

**Opportunities:** Large numbers of potential clients, large number of farms and farmers markets, diversity of crop types and farm size, a variety of farming styles, cost competitive produce available from farms, established models of local food distribution (Community Alliance with Family Farmers’ Growers’ Collaborative, Producer Hunter/Fresh Point, etc.)

**Background:** New York City is the nation’s largest school district with more than 1.2 million students. Each day, more than 860,000 meals are served. For nearly 3 years, SchoolFood (the office responsible for NYC school meals) has proactively sought to procure fresh and minimally processed regional foods. While existing efforts, formally part of the SchoolFood Plus Initiative and others were successful, the overall goals and focuses of the work shifted over time. In 2007, City Harvest took over the NYC direction of this project. Prior to that time, FoodChange participated by providing historical information collected through its SchoolFood Plus work, particularly related to local procurement.

**Current Activity:** At this juncture, City Harvest proposes to critically examine the extensive evaluation findings of the initiative and convene a range of key resource persons and stakeholders who can build on the lessons learned from the Initiative and mutually develop the next phase of bringing healthy, local food into NYC schools. Special attention will be focused on listening to the leadership of SchoolFood to ensure that the plan is realistic, progressive, and innovative. Furthermore, City Harvest will keep an eye towards informing the upcoming Child Nutrition Reauthorization by creating working documents and holding briefings on the findings and advocating for improved Federal support of school meals. The comprehensive strategy that is created will inform the development of national procurement and education models that are sorely needed to demonstrate needed improvements in the national school food programs. This will occur through existing networks with the National Farm to School Network, the Food Research Action Center, and numerous advocacy organizations.

Through this process, the next generation of programs and policies to further New York City school food enhancements will be created. Detailed component plans will define the stakeholders and responsibilities, implementation steps, and measures of success.

City Harvest proposes to build on the intention of the SFP Initiative: to improve the eating habits, health, and academic performance of New York City (NYC) public schoolchildren while strengthening the New

York State (NYS) agricultural economy through the procurement of local, regional foods. Furthermore, we will establish, in collaboration with NYC SchoolFood a vision and implementation plan for the next generation of food system work.

While it would be easier and much less intensive to determine the direction and actions SchoolFood should take independently, it is disrespectful to engage in such a process without the full support and enthusiasm of its leadership. To do this, CH will engage with SchoolFood in a full day work session to generate a vision of New York City school food that all participants believe in, value, and respect. Because SchoolFood has already met with City Harvest to underscore its interest and desire for such a meeting, we feel confident that such a meeting will happen in the very immediate future. Shortly thereafter, we will jointly invite a select group of activists, policy makers, and decision makers in New York City to participate in this planning process that is expected to last about 3 months. During this time, in approximately three additional gatherings, these individuals will work collectively to:

1. Articulate what success will look like if the vision of SchoolFood is achieved.
2. Define the gap that exists between our current reality of school food and the vision.
3. Discuss the “best of” past and current projects to inform future work.
4. Establish a funding mechanism by broadening the stakeholder base to include additional funders, technical experts, and community organizations.

These activities will occur by hosting information briefings and consultative sessions with an expert facilitator. At the culmination of these activities, a 3-5 year strategy and implementation plan of next generation programming will be devised that will outline the steps needed to achieve our vision of improving school food. The plan will address Local Procurement, involvement of youth, educational training (children and families), staff training (school staff, including teachers and food service workers), and policy support. Additionally a small number of pilot projects will be launched in different program areas that SchoolFood is interested in. These are likely to include school garden projects, nutrition education programming, and procurement assistance. The goal of these initial projects is to demonstrate easy success and ease of Partnership for SchoolFood. Furthermore, these projects will help school food in its established desire to address food systems both in and out of school dining rooms.

**Barriers:** The barriers outlined here are taken from the findings of the SchoolFood Plus Phase 3 Interim Evaluation report. While SchoolFood has historically procured some locally grown products through its established distributors, it was impossible to quantify the volume of products or individual farmers associated with those items. There have been no information systems in place to track products coming from New York

farms because product origin has never been part of the food procurement accounting system, nor is it common practice elsewhere in the food chain, such as at produce markets or warehouse operations.

Furthermore, unlike the typical farm-to-school paradigm of an individual farmer supplying a school or school district with farm product, the local procurement agenda in New York City could not be realized by working with individual farmers. The scale of the school system, the existing procurement system, kitchen systems, and regional agricultural infrastructure and logistics prevent these types of relationships.

Even if SchoolFood wanted to change its procurement system to favor local farmers, a number of barriers make it difficult, including difficulty in identifying individual farmers that would be affected. These barriers include:

- the state's farmers are limited by their growing season, which makes consistent, year-round supply of a large variety of fresh products impossible for many items;
- few individual farmers could meet the system's large volume requirements;
- there is limited packing and distribution capacity in the region to meet the schools' specifications and logistics requirements;
- the chain of brokers and distributors that generally put the purchasing decision outside the hands of the school system;
- many produce items are frozen or processed to some degree; and, thus
- a relatively small quantity of products enter the system in their fresh, whole form. Distributors purchase fresh products by the case and then repack it according to each school's order, so that many deliveries of fresh produce are counted by the piece or small bag (not by the case). This significantly limits economies of scale that could be achieved with the local procurement strategy.

**Need:** The role of “public interest broker<sup>TM</sup>” – should be defined as clearly beneficial and necessary to ensure that the local food agenda is maintained. Ultimately, SchoolFood will have to adopt the role and develop a similar position. As an advocate and supporter, our role is to facilitate that transition, ensure food system education, and ultimately buy-in from SchoolFood and City officials.

## SCHOOLFOOD FRUIT & VEGETABLE PURCHASES THAT CAN BE GROWN LOCALLY (\$)

	PURCHASED	DONATED	TOTAL	
Fresh	\$4,743,821	\$357,062	\$5,100,883	32%
Frozen	\$2,682,126	\$197,882	\$2,880,008	18%
Minimally Processed	\$7,567,192	\$432,824	\$8,000,016	50%
Total	\$14,993,139	\$987,768	\$15,980,907	100%

Source: Freedom of Information Act (FOIL) analysis of SchoolFood purchases 12/2004 – 11/2005.

## SCHOOLFOOD FRUIT & VEGETABLE PURCHASES THAT CAN BE GROWN LOCALLY (LBS)

	PURCHASED	DONATED	TOTAL	
Fresh	11,212,308	3,254,263	14,466,571	48%
Frozen	N/A	N/A	N/A	N/A
Minimally Processed	N/A	N/A	N/A	N/A
Total	18,831,886	11,118,061	29,949,947	100%

Source: SchoolFood Plus Local Procurement Team analysis of SchoolFood purchases 12/2004-11/2005.

According to analysis of FOIL data on SchoolFood's purchases, partnerships could yield the following quantifiable impacts to the region's farmers:

- \$776,039, by replacing four existing frozen products which now come from non-local sources with local frozen products, assuming 80% of the ingredients over the course of the year come from New York.

## SCHOOLFOOD LOCAL PROCUREMENT TEAM STRATEGY FOR LOCAL PURCHASING PRIORITIES

ITEM	FROZEN PROCURED	% DONATED	POTENTIAL REVENUE IF 80% LOCAL
Sliced carrots	\$92,742	73%	<b>\$74,194</b>
Corn	\$219,105	66%	<b>\$175,284</b>
Corn on the cob	\$381,506	75%	<b>\$305,205</b>
Green beans	\$276,696	47%	<b>\$221,357</b>
TOTAL			<b>\$776,039</b>

- \$749,844, by procuring peaches (\$291,131), plums (\$171,910) and pears (\$286,803) from local sources.
- Approximately \$651,000, by procuring 12 fresh items for SFP menu items, to be served system-wide in SY 2006-07. (This calculation is based on 35% of total usage of 12 vegetable items, which would coincide with SchoolFood's menus and the growing season.)
- Approximately \$500,000 for the next growing season, by replacing locally grown carrots for California carrots in the bagged baby carrots coming from Champlain Valley Specialties.
- \$1,044,557 bagged sliced apples

In aggregate, this equals \$3.72 million.

# STRATEGIC PLAN FOR FARM TO SCHOOL NEW YORK CITY

## For UPS Strategic Planning Process - 2007 to 2009

### BACKGROUND

The overall goal is to provide fresh fruits and vegetables and other farm raised products to children in areas of high food insecurity through improving distribution systems for the delivery of local products. A major conclusion of the strategic planning process was that programs already exist in which such food is delivered through existing distribution systems. A barrier to increasing the amount of fresh, local food is the “business as usual” of procuring food at the lowest cost, together with the recent budget cuts. Thus, one of the goals was to begin to shift the institutional culture toward greater value of fresh, local food so that these products will be sought even in challenging budgetary times.

Another conclusion from the strategic planning process was myriad pilot programs of farm to school character connect students to such foods in a handful of schools (~25-50). Yet there are major challenges to bringing these programs to New York City’s 1500 schools. Therefore, the goal of our work shifted from development of new distribution systems and new pilots programs to focusing instead on how to expand existing successful pilot programming to more schools.

The specific long term goals that came out of the strategic planning work were:

- Increase student participation in breakfast and lunch programs
- Improve quality of food, increasing the quantity of fresh and whole food and local food

The short term objectives that were identified as next steps to advance toward the long term goals were:

- Expand or institutionalize successful pilots
- Plan for future pilot implementation, expansion, and evaluation
- Improve communication internally (within SchoolFood) and externally (between SchoolFood and external partners)

*All of the above objectives contribute to the achievement of the long term goals.*

GOAL 1	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETE OR IN PROCESS	BENCHMARKS	PROJECTS
<b>Expand or institutionalize successful pilots</b>	<ol style="list-style-type: none"> <li>1) Catalogue current pilots and successes</li> <li>2) Develop a plan for SchoolFood to promote current pilots to schools</li> <li>3) Develop metrics to track for success for each pilot</li> <li>4) CH will link to one school in Brooklyn to assist the school to access School-Food programs (eg, those identified as best practices in the strategic plan).</li> </ol>	<ol style="list-style-type: none"> <li>1) School participation in pilot programs (Principal acceptance/uptake of pilots)</li> <li>2) Achievement of success based on identified metrics</li> </ol>	<ol style="list-style-type: none"> <li>1) Identify pilots that a) deliver high quality food and b) increase student participation in meals</li> <li>2) Develop metrics for success</li> <li>3) Develop promotional materials for pilots</li> <li>3) Develop a plan to publicize program options to schools</li> </ol>		<ol style="list-style-type: none"> <li>1) Gather information from SchoolFood staff on pilot programming and goals</li> <li>2) Develop promotional materials for Breakfast in the Classroom, Garden to Café, and Water Pilot.</li> <li>3) Distribute materials to principals, school staff, and post on website (not completed)</li> </ol>

GOAL 2	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETE OR IN PROCESS	BENCHMARKS	PROJECTS
<b>Develop a system for planning future pilots with a focus on measuring success and planning for expansion</b>	<ol style="list-style-type: none"> <li>1) Identify gaps in system for pilot expansion</li> <li>2) Develop metrics to track for success for each pilot</li> <li>3) Develop a project planning template for SchoolFood pilots</li> </ol>	<ol style="list-style-type: none"> <li>1) Implementation of project planning template</li> <li>2) Tracking of metrics</li> </ol>	<ol style="list-style-type: none"> <li>1) Identify gaps in process, including identifying decision makers and chain of communication, metrics needing to be tracked</li> <li>2) Develop and share project planning template</li> </ol>	<ol style="list-style-type: none"> <li>1) Fall 2009 - SchoolFood began use of project planning template to track collaboration with Wellness in the Schools</li> </ol>	<ol style="list-style-type: none"> <li>1) Gather information from SchoolFood staff on pilot programming with a focus on barriers to expansion and threats to program sustainability</li> <li>2) Plan for introducing project planning template into institutional procedures</li> </ol>
<b>GOAL 3</b>	<b>IDENTIFIED ACTION</b>	<b>OUTCOMES TO EVALUATE</b>	<b>ACTIONS COMPLETE OR IN PROCESS</b>	<b>BENCHMARKS</b>	<b>PROJECTS</b>
<b>Improve communication internally (within SchoolFood) and externally (between SchoolFood and external partners)</b> <i>Note * Although this was identified as an important standalone goal, the work toward the other two goals helps to achieve this goal and therefore the actions may seem redundant</i>	<ol style="list-style-type: none"> <li>1) Identify mechanisms for communication with internal &amp; external stakeholders</li> <li>2) Identify links in chain of communication within SchoolFood and between SchoolFood and school community (cafeteria-based staff, principals, and others)</li> <li>3) Develop communication systems to make other stakeholders in the school community aware of program options</li> <li>4) Develop metrics to track for success for each pilot</li> <li>5) Develop a project planning template for SchoolFood pilots</li> </ol>	<ol style="list-style-type: none"> <li>1) Implementation of communications systems developed (e.g., distribution of promotional materials, posting of pilot catalogue on website)</li> <li>2) Use of project planning template and tracking</li> </ol>	<ol style="list-style-type: none"> <li>1) Catalogue current pilots and successes</li> <li>2) Develop a plan to publicize program options to schools</li> <li>3) Develop and share project planning template</li> <li>4) CH to establish relationship with a school in target area in Brooklyn to be a model for connecting to SchoolFood headquarters and Regional Coordinator.</li> </ol>	<ol style="list-style-type: none"> <li>1) Fall 2009 - SchoolFood will convene a Culinary Partners Forum in October 2009 to plan for continued collaborations with non profits, chefs/restaurants, other government agencies working to improve food quality and support nutrition education.</li> </ol>	Same as above



# APPENDIX D:

## Center for Food & Justice Documents



Urban & Environmental Policy Institute  
 OCCIDENTAL COLLEGE  
 ...for a more just, livable and democratic region.

Center for Food & Justice  
 Farm to School – Distribution Problem Statement  
 February 2008

**Background:** Southern California is defined as stretching north to south from Ventura to San Diego County, and also encompasses Los Angeles, San Bernardino, Orange, Riverside and Imperial counties. The Center for Food & Justice (CFJ) has worked on promoting farm to school and farm to institution programs in the region for ten years. CFJ has recognized the need for local produce distribution systems in order to expand the farm to institution model throughout the region.

**Farms:** Southern California is a vastly sprawling urban environment with a rapidly expanding population which is predominantly located in Los Angeles, Orange, San Diego, and Riverside Counties. Farms are most frequently located on the outskirts of the urban sprawl, or city edges. There is roughly about 350 miles between the borders of the Northern and Southern most counties, which are also home to the most fertile and rich agricultural lands. Los Angeles County has few farms in its core, there are only 150 farms in Los Angeles County. Of these only 90 produce food on a commercial scale, most grow root vegetables like potatoes, onions, turnips and beets. Of these 90 only 11 are certified organic producers. In contrast San Diego County has the second largest population of farms in the U.S., 63% of which are between 1-9 acres, and the sixth highest urban population among U.S. counties. Thus the number of sophisticated farm operations capable of supplying large markets alone in Los Angeles and San Diego are few. Densely populated Orange County has only one 100% organic farm operation and only a handful of conventional truck farms remain. Ventura County, to the northeast of Los Angeles, is one of the more diverse farm landscapes, with protected agricultural land, a greater diversity of crops grown, and more variation in farm size. San Luis Obispo County has a diverse range of crops and ranch lands as well as strong direct marketing and buy local campaigns. Despite their desert landscapes, Riverside and Imperial Counties are rich agriculture landscapes with a diverse crop mix and large scale export-oriented farms. Riverside County also has one of the most rapidly expanding populations in the nation, so agricultural land is under constant threat. San Bernardino County is largely arid, but some agriculture does exist.

**Clients:** Due in part to CFJ's promotion of the farm to institution model, there is considerable interest in the program from institutions around the region. A minimum of 3 health care systems with at least 20 hospitals, and 12 school districts with at least 200 schools would be immediately interested in utilizing a local food distribution solution. Other potential hospital and school clients could be fairly easily identified. Inquires into local purchasing are constantly fielded from schools and hospitals, and CFJ plans to undertake outreach to other institutions such as universities, elder care, child care, juvenile hall facilities, prisons, etc. as well as under go expansion of farm to school programs in Southern California. CFJ has also been working with the Los Angeles Unified School District (over 700 schools) to incorporate cafeteria-based improvements for several years, but has been unsuccessful in promoting local purchasing for the entire school district due to lack of reliable distribution systems. The district has recently agreed to host farmers' markets at select high schools, and may be amenable to piloting the farm to school model in the future.

**Distribution:** The region is dominated by Sysco and other large distribution firms acting as institutions' primary food service providers. A number of "larger" distribution firms were interested in servicing institutions with local foods, about 5 or more Los Angeles based firms already emphasized local or specialty food product lines. In addition many small or boutique produce firms specialized in local foods sourcing from farmers markets and farmers across the southland. Some of these firms already serviced Kaiser Permanente, school districts or other institutional clients interested in sourcing local. Therefore it was thought that some distribution firms could supply these clients with local foods; however, these product lines are still too expensive and inconvenient for institutions.<sup>1</sup> These large distribution firms have a number of resources to establish local food specialty lines that are unavailable to local farmers or small produce firms such as developed infrastructure, capital investment, marketing expertise, highly developed customer service and logistical skills. Unless these large produce firms make a concerted effort to engage in business with lower income clients, while lower income clients attempt to modestly increase their food budgets, this distribution model will remain within its niche.

CFJ is planning to expand upon its 2006/2007 exploratory research of local food distribution. We are seeking support to partner with farm based organizations to further develop the capacities of farmers to grow, handle and distribute local foods to institutional clients.

**Barriers:** Sprawl, disconnect between farms, threat to farmland, highway congestion, highly competitive produce industry, limited farm infrastructure and support systems.

<sup>1</sup> For example, Fresh Point of Southern California, a Sysco subsidiary, services 3-4 Kaiser Permanente hospitals with a limited number of foods. Based on a velocity report, within a 12-month period Fresh Point shipped 63 items and well over 21 tons of food (tomatoes and zucchini being the most popular items) to Kaiser Permanente hospitals.

# STRATEGIC PLAN FOR FARM TO SCHOOL LOS ANGELES

## For UPS Strategic Planning Process - 2007 to 2009

Overall Mission: Increase popularity of farm to school programs and develop the capacity of Los Angeles food and farm based organizations to distribute locally grown foods to active and developing farm to school programs in the Los Angeles area.

GOAL 1	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETED OR IN PROCESS	PROJECTS
<b>Engage larger distribution firms in developing regional distribution solution for Los Angeles based schools.</b>	1) Develop local food services that will help schools to buy &/or cook with regional foods in their cafeterias.	1) Identify barriers & opportunities to purchasing regional foods for LA region.	1) Develop the concept for the Local School Food line- Complete.	1) Local School Food line.
	2) Develop the capacity of distribution firms to provide innovative local food services to school clients.	2a) Creation of Local School Food line. 2b) Number of distribution firms working with or vending the services of the Local School Food (LSF) line.	2) Distribution partners identified, additional partners to be identified & engaged-On-going.	2) Regional Lead Team for Wallace's National Good Food Network.
	3) Develop a Local School Food Line to be sold through distribution firms.	3) Additional services &/or models developed/used by distribution firms to sell regional foods.	3) Marketing & communications plan to begin August 2009-On-going.	
	4) Develop partnerships with distribution firms.	4) Number of marketing tools to promote the use of the LSF for both distribution firms & schools.	4) Identified how and what barriers a LSF may address for both distribution firms & schools, to be used as a potential marketing tool-Complete.	

GOAL 2	IDENTIFIED ACTION	OUTCOMES TO EVALUATE	ACTIONS COMPLETED OR IN PROCESS	PROJECTS
<p><b>Engage and increase the role Farmers' Market Associations &amp; Farmers' Markets play in the distribution of regional foods to all institutions in the LA region.</b></p>	<ol style="list-style-type: none"> <li>1) Assess current LA Farmers' Market direct marketing &amp; distribution programs.</li> <li>2) Targeted outreach &amp; education about Farmers' Market and/or emerging Farmers' Market based distribution programs, aimed at Farmers' Market Associations &amp; Farmers' Market Managers.</li> <li>3) Assist in the development in new Farmers' Market based distribution programs in LA.</li> </ol>	<ol style="list-style-type: none"> <li>1) Assessment of Farmers' Market distribution based programs for LA &amp; exemplary national models.</li> <li>2) Number of outreach techniques and facilitated workshops.</li> <li>3) Number of new Farmers' Market based distribution programs in Los Angeles &amp;/or Southern California.</li> </ol>	<ol style="list-style-type: none"> <li>1) Farmers' Market Assessment complete.</li> <li>2) Workshops to engage Farmers' Market audience in this project-In Process.</li> <li>3) Drafting Farmers Market Hub concept paper-In-Process.</li> <li>4) Strategic plan for the Farmers' Market Hub LA project-Complete.</li> </ol>	<ol style="list-style-type: none"> <li>1) Farmers' Market Hub.</li> <li>2) Regional Lead Team for Wallace's National Good Food Network</li> </ol>
<p><b>GOAL 3</b></p> <p><b>Provide increased outreach and technical assistance to schools, distribution entities &amp; other farm to school practitioners about ways to access good food in schools.</b></p>	<p><b>IDENTIFIED ACTION</b></p> <ol style="list-style-type: none"> <li>1) Launch communications &amp; outreach campaign.</li> <li>2) Advertise distribution entities, farmers and other local food buyers and sellers that service farm to school programs.</li> <li>3) Create an LA &amp; SD Menu of Options &amp; other outreach materials for farm to school programming.</li> <li>4) Focus more staff attention on farm to school L.A.</li> </ol>	<p><b>OUTCOMES TO EVALUATE</b></p> <ol style="list-style-type: none"> <li>1) Number if outreach materials developed.</li> <li>2) Number of distribution entities, farmers and other local food buyers and sellers that partner with us.</li> <li>3) Number of new staff.</li> <li>4) Number of new LA farm to school programs.</li> </ol>	<p><b>ACTIONS COMPLETED OR IN PROCESS</b></p> <ol style="list-style-type: none"> <li>1) The Menu of Options brochure for LA &amp; SD-Complete.</li> <li>2) Pre-K staff hired.</li> <li>3) Hired a design &amp; communications firm.</li> </ol>	<p><b>PROJECTS</b></p> <ol style="list-style-type: none"> <li>1) Farm to Pre-K.</li> <li>2) Regional Lead Team for Wallace's National Good Food Network.</li> <li>3) Local School Food line.</li> </ol>

# APPENDIX E: FARM TO SCHOOL INDICATOR SURVEY Compiled Results FY07-FY09

QUESTION	GROUP 1			GROUP 2			GROUP 3			GROUP 4			TOTAL		
	ASAP			City Harvest			Farm to Table			Center for Food & Justice					
As of June 30 each year:	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09
<b>PROJECT DETAILS</b>															
1	4	6	5	1	1	1	3	8	10	10	13	13	18	28	29
2	29	69	86	200	200	200	204	307	284	75	80	80	508	656	650
3	12,000	50,000	47,600	43,699	43,699	43,699	111,100	167,114	145,580	20,000	20,000	20,000	186,799	280,813	256,879
4		29	6		0	0	204	307	307					336	313
5		40	80	200	200	200	0	0	0					240	280
<b>DOLLARS &amp; POUNDS</b>															
6	\$13,000	\$37,000			\$4,421,210	\$4,421,210	\$160,000	\$295,000	\$250,000				\$173,000	\$4,753,210	\$4,671,210
7	\$1.08	\$0.74		\$0.00	\$101.17	\$101.17	\$1.44	\$1.77	\$1.72	\$0.00	\$0.00		\$0.93	\$25.92	\$25.72
8		24,776			8,129,861	8,129,861		300,000	500,000				N/A	8,454,637	8,629,861
9	\$55,000	\$150,000	\$39,000	\$550,000	\$2,685,000	\$5,084,000	\$67,500	\$195,000	\$317,000	\$245,500	\$256,500	\$256,500	\$5,868,000	\$3,286,500	\$5,696,500

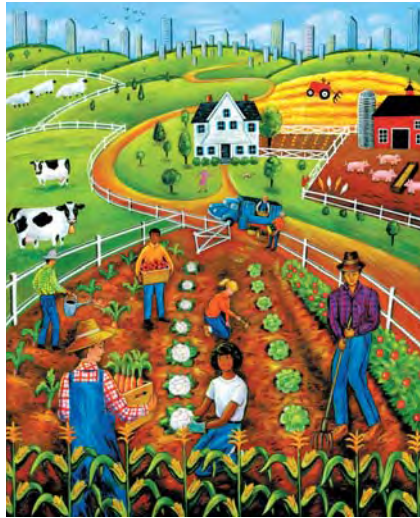
# APPENDIX E: FARM TO SCHOOL INDICATOR SURVEY Compiled Results FY07-FY09 (CONTINUED)

QUESTION	GROUP 1			GROUP 2			GROUP 3			GROUP 4			TOTAL		
	ASAP			City Harvest			Farm to Table			Center for Food & Justice					
As of June 30 each year:	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09
<b>GEOGRAPHY</b>															
10	4	5	23	3	3	3	3	8	10	8	11	11	18	27	47
What were the number of cities reached by your services?															
11	1026	2054	1970	148	148	148	2850	10,750	13,300	933	2194	2194	4,957	15,146	17,612
What was the geography covered by those cities (square miles)?															
<b>PARTNERS</b>															
12		32	70		50	64	21	29	34		6	6		117	174
What were the number of organizations and farmers collaborating on your farm to school project?															
13 Please specify the number for each type of organization or farmer that you have counted for Question #13.															
Small-Scale Farmers (50 acres and under)		11	40		0	0	12	17	20		3	3		31	63
Large-Scale Farmers (over 50 acres)		4	10		0	0		0	0		0	0		4	10
Farmer Organizations		3	8		0	2	1	1	1		0	0		4	11
Non-profit CFS Organizations		1	0		0	0		0	0		0	0		1	0
Other Non-profit Organizations		4	3		45	50	1	1	0		0	0		50	53
Food Service Providers		2	5		5	5	5	8	10		2	2		17	22
Restaurants		4	0		0	3		0	0		0	0		4	3
Parent Organizations		2	2		0	4		0	0		1	1		3	7
Other Groups		1	2		0	0	2	2	3		0	0		3	5

# APPENDIX E: FARM TO SCHOOL INDICATOR SURVEY Compiled Results FY07-FY09 (CONTINUED)

QUESTION	GROUP 1			GROUP 2			GROUP 3			GROUP 4			TOTAL		
	ASAP			City Harvest			Farm to Table			Center for Food & Justice					
As of June 30 each year:	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09	FY07	FY08	FY09
<b>PLANNING</b>															
14	For each of the following steps needed to develop a strategic plan, please rate how far along in the process you were as of June 30, 2008. *														
	Initial Community Assessment	4	4	4	4	4	4	4	4	4	4	4	4	4	4
	Development of Preliminary Strategic Plan	3	4	4	4	5	5	5	5	1	4	4	3	4	4
	Synthesize Key Learnings	3	4	4	3	4	5	5	5	1	2	3	4	4	4
	Strategic Plan Completed	3	4	4	1	3	5	5	5	1	3	4	1	3	3
	Other Steps	3	3		4					5			1	3	0
15	Please list the steps that your organization has taken or is planning on taking to help expand your distribution systems in each of the rows below. Then, rate how far along in the process you were as of June 30th for each step. *	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]
16	Comments	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]	[see insert]

\*RATINGS: 1=No Action At All; 2=Proposed; 3=In the Planning Stages; 4=Partially Completed; 5=Fully Completed



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