

APPENDIX V AFFINITY GROUP AND CLUSTER COMPOSITION

One of the tests of network strength can be an analysis of the actual population of the affinity groups and their related food system clusters: agricultural production, markets, supply chain infrastructure, supporting businesses, and food system capacity. We relied on a social network approach for populating the affinity groups, which involved outreach to stakeholders for the Local Food Assessment and Plan and other identified leaders and organizations within the local food movement. We asked these individuals to sign-up and invite others connected to their immediate networks. The sign-ups and clustering of individuals reflects some of the strengths and well-represented aspects of the network. Addressing some noticeable gaps in supporting businesses and supply-chain infrastructure will be a necessary component for a) growing networks that represent those clusters and b) strengthening network connections with already existing businesses in those clusters.

We analyzed the composition of affinity groups for the first six months of the process to get some indications of how networks are currently shaped and where weak links or gaps appear that reduce the overall effectiveness of each sector. This analysis was compared to the composition of interest groups developed on the LocalFoodCleveland website. Both of these analyses are used to judge the current strength of the local food network represented through participation on *NEOFoodWeb.org* and *LocalFoodCleveland.org*.

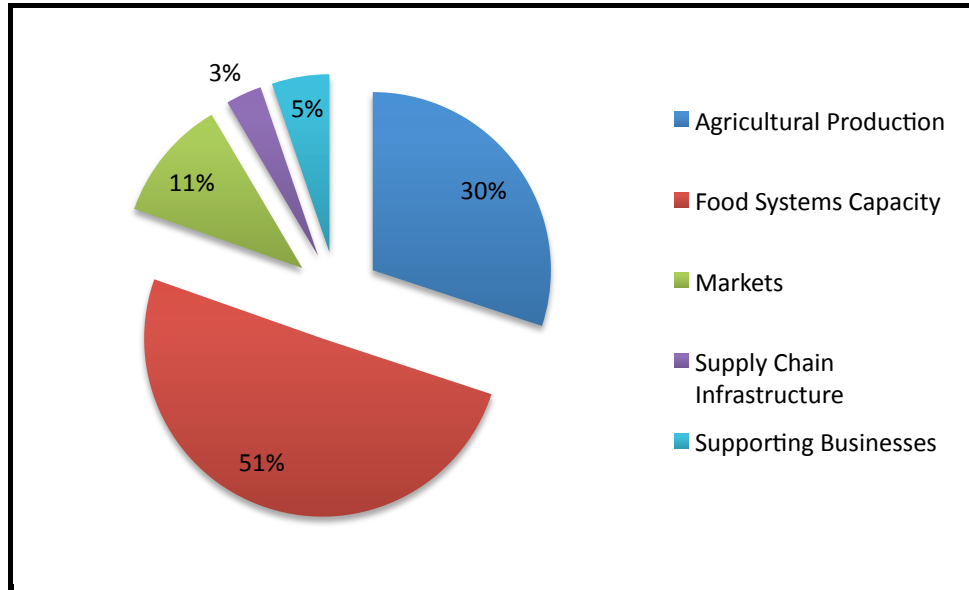
The breakdown by cluster through August 31, 2010 of NEOFoodWeb participants is represented in the chart below:

Chart 18
Breakdown of Affinity Group Participation by Clusters

Cluster	Members	%
Food System Capacity	77	50%
Agricultural Production	46	30%
Markets	17	11%
Supporting Businesses	8	5%
Supply-Chain Infrastructure	5	3%
TOTAL	153	



Chart 19
Distribution of Food System Clusters on *NEOFoodWeb.org*

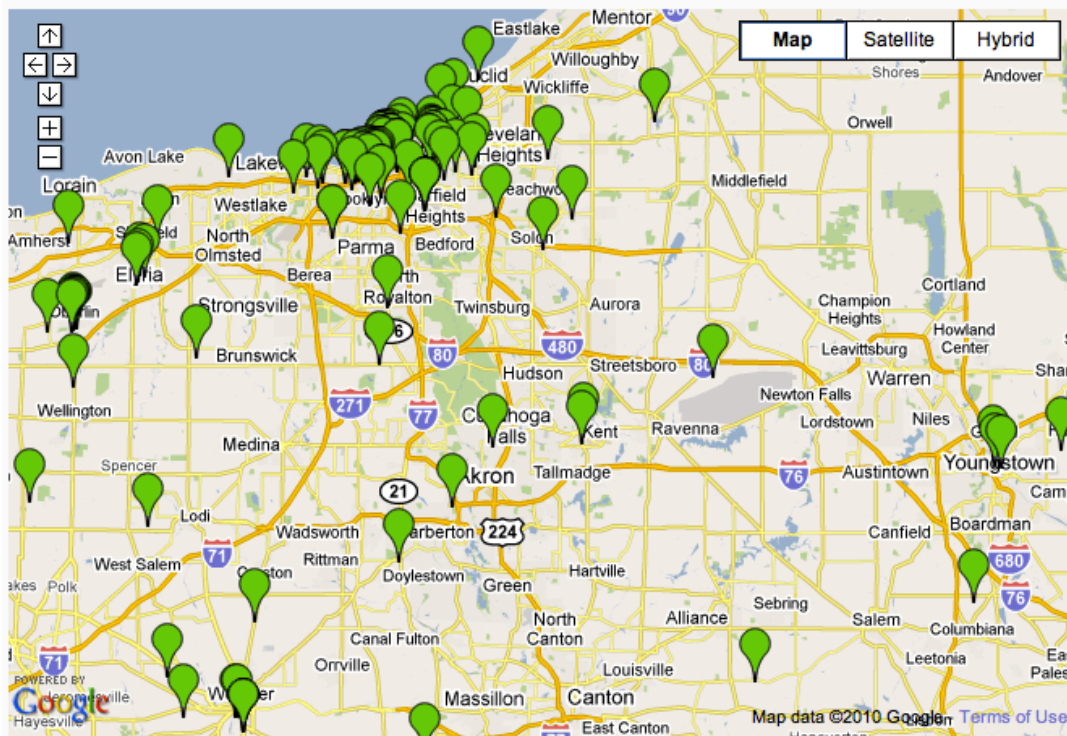


With a total of 153 members as of September 2010, 81% of the affinity group members fall into either the agricultural production or food system capacity clusters, with the highest percent (51%) in food system capacity. Agricultural producers are also well-represented as a cluster, with about 30% of the overall affinity group members. There is a significant level of activity in the local market cluster around local food systems, but this was not represented in the individuals that signed-up to participate and could represent a weak link in the local food network as currently composed. Supporting businesses (compost, construction, farm supplies, etc.) and supply-side infrastructure are only marginally represented with 5% and 3% of the overall membership respectively.

(1) Geographic Distribution of Affinity Groups

The distribution of affinity group members to date has the highest concentration in Cleveland and Cuyahoga County. The following rough estimate is based on an approximate count of where people are based. A handful of affinity group members did not identify a location or registered a post office box.

Chart 20
Residence of Affinity Group Members



Distribution of Affinity Group Members:	#	%
Cleveland	48	35%
Cuyahoga County	30	30%
Northeast Ohio (excluding Cuyahoga)	49	36%
Columbus/Athens	4	2%
Out of State	4	2%

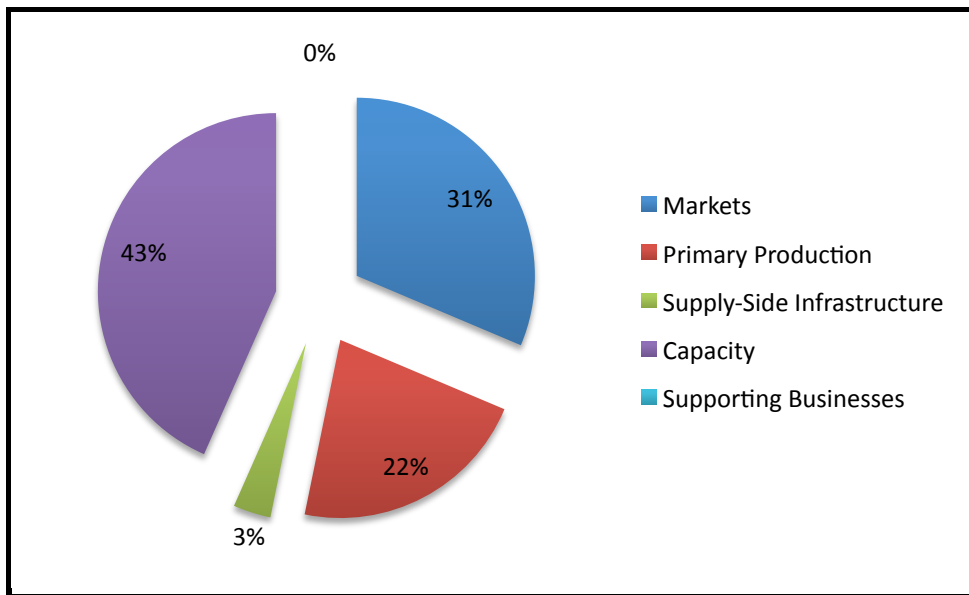
About 65% of the total members are from within Cleveland and Cuyahoga County with about 30% in Northeast Ohio from outside of Cleveland and Cuyahoga County. Four came from Columbus or Athens. Four were from out of state (Chicago, Washington D.C., and Philadelphia). Out of state members were members of the regional and federal EPA interested in urban agriculture and Michael Shuman and staff. This reveals another weak-link in the local food groups that initiated the assessment. In particular, strengthening network connections between urban centers practicing and implementing local food activities and stronger urban and rural connections will be critical to the growth of the local food economy.

(2) Local Food Cleveland Assessment

Peter McDermott with Entrepreneurs for Sustainability (E4S), the developer of Local Food Cleveland, noted a very similar pattern of distribution of users on the Local Food Cleveland website as was experienced in *NEOFoodWeb.org*. The Local Food Cleveland website exemplifies a significant number of users, including: urban growers, local farmers, leaders of non-profit organizations and government, and people interested in supporting local food systems. There is little participation among businesses, processors, food manufacturers, or distributors, according to McDermott.

A review of the 56 Local Food Cleveland groups generated and populated voluntarily by *LocalFoodCleveland.org* users reveals the following split between the same five sectors developed for *NeoFoodWeb.org*.

Chart 21
Interests of Users by Cluster of *LocalFoodCleveland.org*



The split includes the distribution of a total of 1524 combined members signed up for the groups. With the exception of greater activity in the markets cluster on *LocalFoodCleveland*, this distribution mirrors the distribution experienced on *NEOFoodWeb.org*. The markets group (31% of the total) includes mostly farmers markets, the City Fresh CSA, and cooperative markets or buying clubs. The primary producers (22% of total) consists almost exclusively of urban farmers and gardeners. The capacity group (43% of total) involves regional learning networks (NEO permaculture, NEO bee-keepers, 10,000 farmers in 10 years¹⁰¹), foraging and food exchange groups (people sharing seeds or harvesting

¹⁰¹ “10,000 farmers in 10 years” is a project of the *LocalFoodCleveland* site.

untended fruit trees), advocacy, and branding groups. The supply-side infrastructure group (3% of total) included people who were involved with distribution or starting processing kitchens, and there were no identified groups that fit into the supporting businesses cluster.

(3) Observations

The initial distribution of affinity groups for the survey and groups organized through Local Food Cleveland provides some rough, though not conclusive, information about the nature of the local food networks in Cuyahoga County and Northeast Ohio.

As a project that was initiated by funders and organizations in Cuyahoga County, it is to be expected that the majority of members are Cuyahoga County based. The groups that initiated the study were all not-for-profit organizations based in Cuyahoga County, so it is to be expected that the “food systems capacity” cluster, which encompasses non-profit and government agencies ended up with the highest number of members. It was also noted by a handful of businesses and farmers that they wanted to be more active with the assessment process, but lacked the time to participate during the growing season.

Having 35% representation from outside of Cuyahoga County demonstrates some growth in broader regional networks of farmers or local food initiatives connected to other municipalities. Future efforts should focus on fostering more representation from outside of Cuyahoga County, as that will be critical to expanding available food and opportunities to create more network connections between rural and urban populations.

The members from outside of Cuyahoga County came mostly from outreach with the Ohio Ecological Food and Farm Association, Local Roots in Cleveland, the Ag-Bio Cluster Leadership Council, and the Lorain County Ag-Bio Industry Cluster stakeholders group.

The lack of initial participation by individuals involved with markets (farmers markets, restaurants, grocers, etc.) is not immediately clear. The Cleveland-Cuyahoga Food Policy Coalition and the steering committee include networks that were heaviest on government and non-profit organizations with little representation from local businesses. Again, time and capacity to participate in the study may be a limiting factor.

It is clear that the “supply chain infrastructure” cluster is the least connected network. Two conclusions can come from this. First, there are presently multiple businesses in Cuyahoga County engaged with food manufacturing/processing, aggregation, and distribution. However, these businesses are mostly set-up with aggregation and distribution for food being imported into the region. Second, this represents a lack of existing processing, distribution, and aggregation



infrastructure that is set-up to support local farms or urban agriculture, making it a rich area for cultivating new entrepreneurs. This is further reinforced through a primary read of the asset-gap analysis which reveals the top two areas of greatest needs as distribution/storage and processing/manufacturing.

The “supporting businesses” also has little representation on the NEOFooWeb site. This also likely reflects a lack of network strength around the businesses that support local food systems (composting operations, materials recycling, greenhouse manufacturers, farm infrastructure construction, nurseries, equipment repair, etc.). The lack of businesses represented in the network can also stem from three possible factors. Many of the existing supporting businesses that support agricultural producers also primarily service industrial-scale or larger scale operations or food distribution from outside of the region. Second, there is not enough scale of activity among smaller food producers or distribution companies to create strong markets for supporting businesses. Third, many smaller producers have bootstrap operations which involve a strong do-it-yourself ethic. The margins for many operations are thin enough that it costs less to contribute one’s own labor rather than hire or rely on an outside service. For example, most small farms produce their own seedling starts, build their own greenhouses, and conduct a lot of their own repair and maintenance on equipment. As we look at avenues for scaling up local food activities, financing for infrastructure could be coupled with small business development in the supporting businesses cluster. However, these businesses will only be viable to the extent that activity grows significantly for primary producers and supply-side infrastructure.

(4) Weak Links and Network Interventions

In summary, beginning with the network of steering committee members and other invited participants for *NEOFoodWeb.org*, we can see the following areas of strength:

- Food systems capacity and agricultural production clusters have strong representation within the initial network.
- Urban and rural producers are evenly represented and well-populated in the agricultural production cluster
- The majority of participation in the food system capacity clusters includes policy and non-profit groups, including non-profit organizations, food policy councils, economic development, and public health

The following weak links are revealed in the system:

- Markets: there are strong and growing markets for local food activity, but they are not well-represented in the *NEOFoodWeb.org* network



- More even urban and rural representation and local food networks that include greater rural participation are needed to get a more geographically balanced perspective
- Supply-side infrastructure and supporting businesses are marginally represented. Activity in these clusters will be further induced by growth in market demand and supply capacity. But networks of existing or potential entrepreneurs should be cultivated for these clusters.

It should be noted that just because clusters or affinity groups are not represented here does not mean that they do not exist. It means that there are not strong network connections with businesses, organizations, or individuals in these areas. Scaling up activity in local food systems will require a more focused effort to improve these network connections.

