

APPENDIX IV AFFINITY GROUP ASSET-GAP SURVEY

An asset-gap online survey was posted on *NEOFoodWeb.org* and completed by 70 members of the virtual think-tank. These survey results present a snapshot of attitudes and opinions of those most active in local food system efforts in the region. The survey represents a 50% participation rate among those signed-up on the on-line community at the time that the survey was issued. The survey elicited user input on the following key issues:

- What are some of the primary indicators or measurements of success in assessing the state of local food systems in Northeast Ohio?
- What are some of the most critical outcomes of investments in local food systems activities (i.e. job creation, reducing carbon emissions, etc.)?
- What are the most critical assets for success that individuals involved with local food efforts rely on?
- What confidence levels do people have about the current status of a variety of local food indicators (network strength, policies, production capacity, etc.)?
- What are some of the dominant barriers that prevent individuals from expanding the scale and impact of their local food activities?

The following sections provide summaries of responses to each of the above questions.

(1) Indicators of Success

Respondents to the asset-gap survey were asked to identify what they saw as the most critical indicators of success in the local food system. The following indicators, some economic and some social, were identified as key:

- *Consumption Rates* –What percentage of food consumed originates from local farms within 100 miles of point of consumption? What percent of the food sold in supermarkets is local? What percentage of food service (restaurants) or school purchasing is local?
- *Economic Impacts* – What are the number of livable wage jobs created in a local food economy? The number of new business or farm starts? Changes in sales and profitability of farms or food-related businesses? What is the diversity of job and skill levels within the local food system? What are rates of growth in total purchasing within the



region? Has there been an increase in the number of small businesses and/or farms meeting local needs?

- *Competitiveness* – What are the price points that make local food competitive with non-local food, provide affordability for consumers, and allow local farms to be viable over the long-term?
- *Urban Agriculture* –What is the per-acre productivity and annual yield of urban farms, economic value of community garden or home-produced foods, number of participants in market garden training programs, number of new farms funded, increase in acreage of market gardens, economic impact of urban market gardens, percent of food grown and consumed within urban boundaries, acreage of land zoned for urban agriculture or part of an urban agriculture district?
- *Supply Side* –What is the change in number of growers and producers selling to local markets within 100 miles of farm, growth in new farmers, percentage of farmers who farm as their sole source of income, number of dollars invested and economic output of processing or distribution companies/facilities, percentage of farmers who value-add products, number of months in year producers sell food to local markets, number of acres enrolled in land protection programs?
- *Markets* -- What is the change in number of farmers markets, road stands, and CSA direct marketing venues, economic impact and participation rates of direct market outlets, percentage food in grocery stores that is local, diversity of food offerings at local markets, number of restaurants that utilize 20% or more of local food, economic impact of restaurant purchasing on local economy?
- *Regional Self-Reliance* -- What is the percent of food produced and consumed in same 16 county region, number of residents producing their own food, self-sufficiency and viability of food/farm enterprises functioning without subsidy, change in market penetration of local food versus industrially-produced/imported food?
- *Environment/Energy* – How is carbon sequestration measured by changes in organic matter content of soils, overall food miles travelled, water quality indicators measuring changes in impact of agriculture on non-point source pollution, calories of energy invested compared to calories of energy returned as measure of overall efficiency of food system?
- *Equity of Access* – What is the number of healthy food outlets within walking distance of residents in low-income communities, reduction in hunger rates, reduction in extent of urban or rural food deserts, public



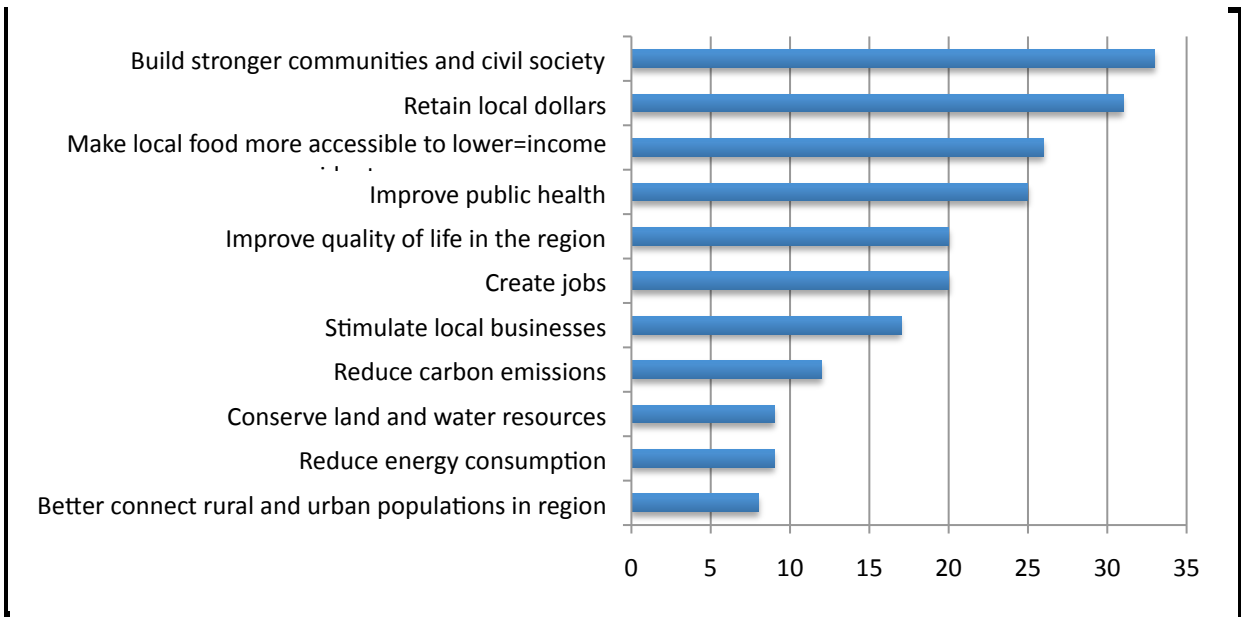
transit connections to healthy food sources, change in number of urban residents able to access healthy food within 1/4 mile of home, affordability of locally grown food, and increase in nutrition of food distributed through food banks or emergency food relief?

- *Health Impacts* – What are the changes in daily consumption of fruits and vegetables for low-income residents, changes in incidences of diabetes treatments, percentage of nutrient dense food consumed by families compared to calorie-dense/processed foods, measurable outcomes for reducing chronic diseases tied to diet, changes in productivity/# of sick days for work-force with food/diet program?

(2) *Critical Outcomes*

This survey question focused on identifying the primary motivations for individuals involved with local food system work. What are the most important or most desired outcomes resulting from local food work? The responses provide a gauge of what individuals ultimately want to see emerge through the development of the regional food economy.

Chart 22
Affinity Group Preferences for Most Important Outcomes of Local Food Activity



Interestingly, the majority of top responses focused on topics relating to quality of life and strength of communities in the region: almost 50% wanted to build stronger communities and civil society, 35% favored making local food more available to broader socio-economic groups and improving public health, and 28% favored improving quality of life in the region. Economic outcomes also were



strong, with 45% favoring the retention of local dollars, 28% favoring job creation and 25% favoring stimulating local businesses. Of less interest among respondents were environmental issues: about 17% favored reducing carbon emissions, and about 10% favoring conserving land and water resources and reducing energy consumption. Only about 10% favored better connections between urban and rural populations.

Certainly, all outcomes are essential for the development of a more sustainable regional food system that builds community, grows the regional economy, and preserves and restores the natural environment. However, in terms of understanding the primary motivations of those working most to grow sustainable local food systems, quality of life and economic outcomes play the strongest role.

(3) *Critical Assets*

NEOFoodWeb participants were asked to identify what they felt were the three most critical assets for success in their own personal work on local food system activities. The following list summarizes the most critical assets identified in the survey.

The top assets, cited by 30-35% of the respondents, included the following:

- *Financial Resources* – The most frequently cited asset focused on financial resources. Financial and technical resources for start-ups in farm and food enterprises were commonly cited. Other resources included funding for developing new urban farm enterprises, program funding for efforts to promote local agriculture, initiatives to address food gaps in limited-resource communities, and programming for youth initiatives. Funding sources included a mix of investment capital and grants.
- *Skills & Knowledge* -- Skills and knowledge for growing successful farm and food-based enterprises was cited almost as frequently as financial resources. Skills and knowledge included: access to information about agricultural production, farm-specific training, better access to information about growing, formal education programs, research-based projects, and identification of effective business models.
- *Social Networks* -- Social networks were also cited almost as frequently as financial resources and skills/knowledge. Social networks included: working collaboratively with other growers and businesses, peer learning networks, social activities and events, professional networks, supporting organizations, and communication systems.

The secondary assets, cited by 20-30% of respondents, were:



- *Land* -- As the critical working capital for any farm-based enterprise, land was cited as a critical asset. Land included use of vacant land, land under personal ownership, lease arrangements, quality soil for growing, rural land conservation, and environmental amenities (soil, water, climate).
- *Markets* -- Markets were also identified frequently as a critical asset. This included access to consumer markets, growing market demand for local food, increased direct marketing options such as farmers markets and community supported agriculture, supportive market partners favoring local purchasing and restaurant and retail businesses providing more time for staff to meet with local suppliers.

Other assets cited by 10% or fewer of the respondents:

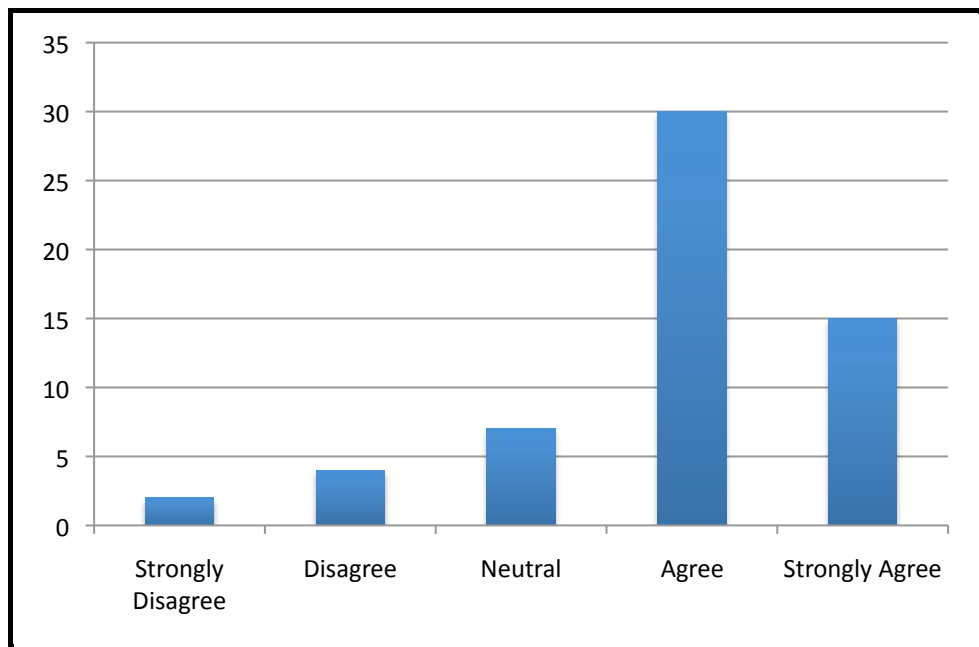
- Favorable policies and support from local government;
- Support organizations that provide funding, technical support, and collaboration;
- Increased support businesses (consolidators, distributors, internal corporate/business support);
- Individuals that already have professional skills and experience based in farming and food-related businesses;
- Physical capital supporting farm and food operations, including equipment, technology, delivery vehicles;
- Business planning skills and experience with starting new business ventures;
- Strong networks of farmers with capacity to grow and supply markets;
- More supportive community that provides volunteers for harvesting or youth-based programs that provide interns/labor support for local farms;
- A spirit for entrepreneurship and innovation.



(4) Confidence Levels

The following charts quantify responses among NEOFoodWeb participants who are active in a variety of efforts to support local food systems development in the Northeast Ohio region. The survey included statements about key indicators of a strong local food economy. Survey participants were asked the extent to which they agreed or disagreed with the statement, indicating their confidence level about the status of that indicator in Northeast Ohio's local food systems. This section will review responses to each statement individually. A comprehensive chart at the end compares confidence levels between indicators. This chart can provide a guide to areas where attention is most needed. The individual charts descend from areas of greatest confidence to areas of least confidence. These charts represent the perspectives of 70 self-selected individuals who responded to the asset-gap survey on *NEOFoodWeb.org*.

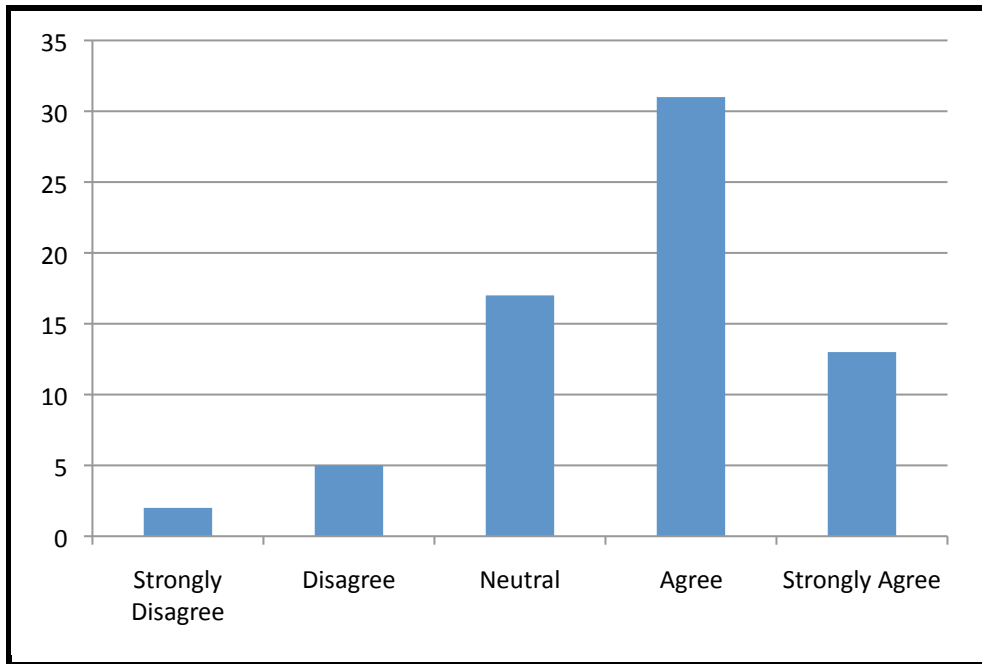
Chart 23
Capacity to Expand Production to Meet Expanded Local Demand



One of the biggest concerns for local food system development lies in the supply capacity of the region. As markets for local food grow, will the system reach a point where demand out-strips supply? Respondents indicated a high level of confidence in our regional capacity to increase supply as direct consumer, wholesale and institutional demand grows. In urban centers like Cleveland and Youngstown, a growing movement toward urban agricultural production on vacant or foreclosed properties can increase supply within city boundaries. The challenge for urban agriculture will be in maximizing productive output on small

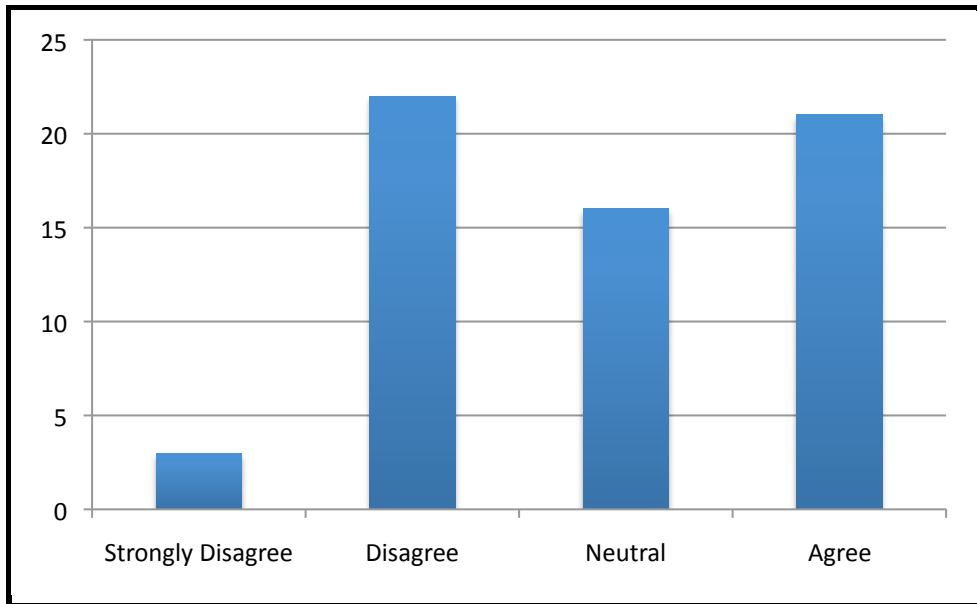
parcels, ranging from a ¼ acre to 6 acres. Productivity can be greatly increased through well-designed and managed greenhouses. Rural areas have larger land areas and many farms are positioned to expand production as urban markets grow. The challenges for rural areas include extending seasonal availability of food while also increasing distribution, aggregation, and processing infrastructure to more efficiently deliver locally grown food to urban and rural populations.

Chart 24
Strong Social Networks



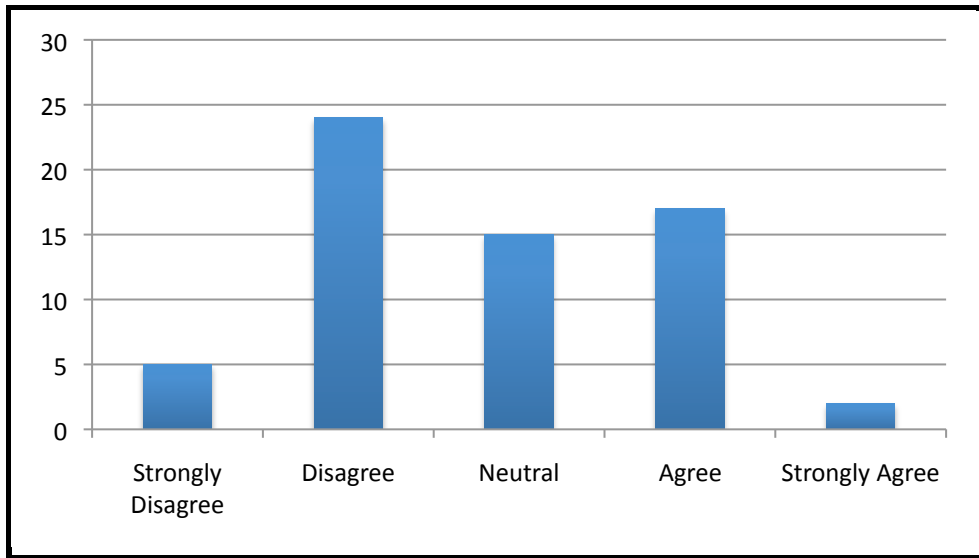
Another indicator for success in local food system development lies in the strength of social networks. Strong social networks increase opportunities for collaboration, whether around supplying markets or sharing production techniques. Respondents indicated strong agreement that they feel supported by others in local food networks. Social networks will be further strengthened by increasing connections and points of collaboration between mixed racial and socioeconomic groups, inclusion of businesses and market partners, and greater rural and urban mixing.

Chart 25
Local Markets Strong



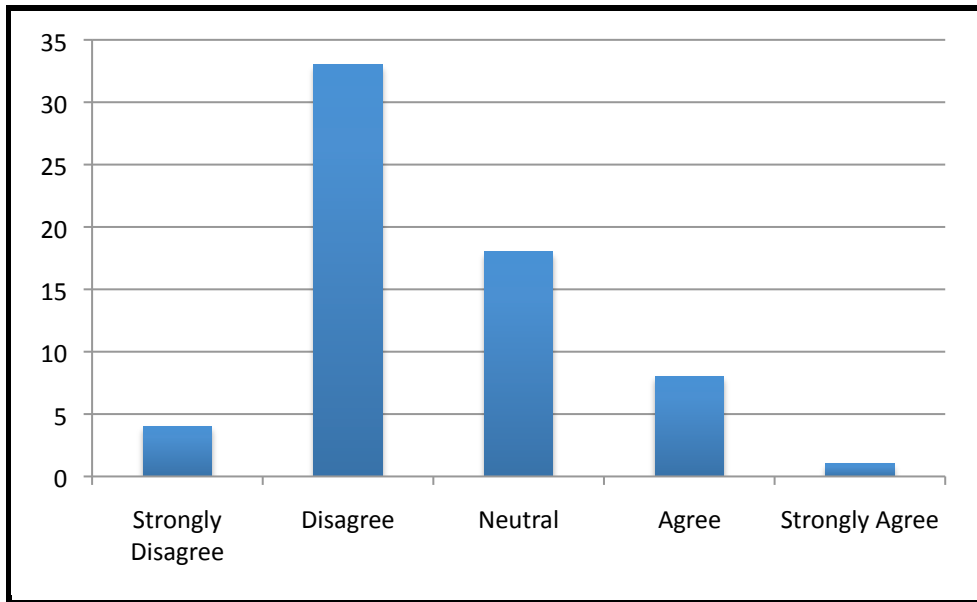
Respondents were divided on the strength of local markets. The recent growth of farmers markets, community-supported agriculture programs and direct purchasing by businesses and institutions indicates a more diverse local market landscape. However, many growers still find barriers to reaching markets, citing concerns with the unwillingness of consumers to pay more for locally grown food. Rural farmers also experience increased barriers reaching urban markets. More effort needs to be applied to facilitating increased market options and better infrastructure for connecting growers to markets. Businesses and consumers also need to adjust to the variations of food availability by seasons.

Chart 26
Land for Growing Accessible



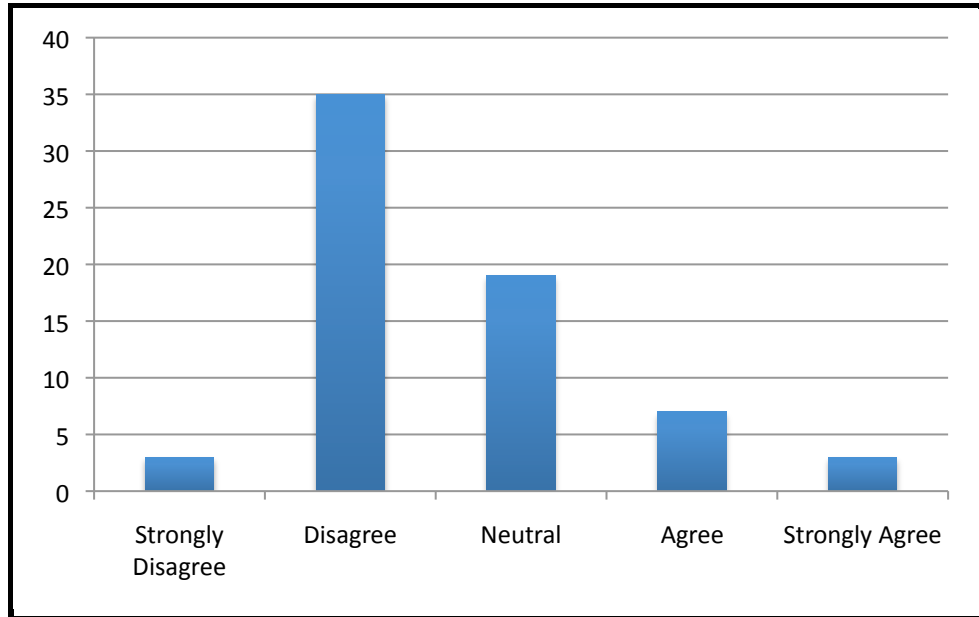
Respondents were also mixed on the availability of land for agricultural production, with a higher proportion disagreeing or strongly disagreeing with “land for growing being accessible.” The decline of the real estate market has slowed the rise of land prices in rural areas. Meanwhile cities like Cleveland and Youngstown are working through land banks and urban policies to make vacant land more accessible for growing. In spite of this, a number of urban farmers in Cleveland cited difficulties working with the City government to make the city land bank land open for urban agricultural production. City officials also shared concerns about the readiness of residents to really make urban farms productive as long-term assets for neighborhoods, citing greater interest than capacity to manage and maintain urban farms long-term.

Chart 27
Local Food Supported by Economic Development



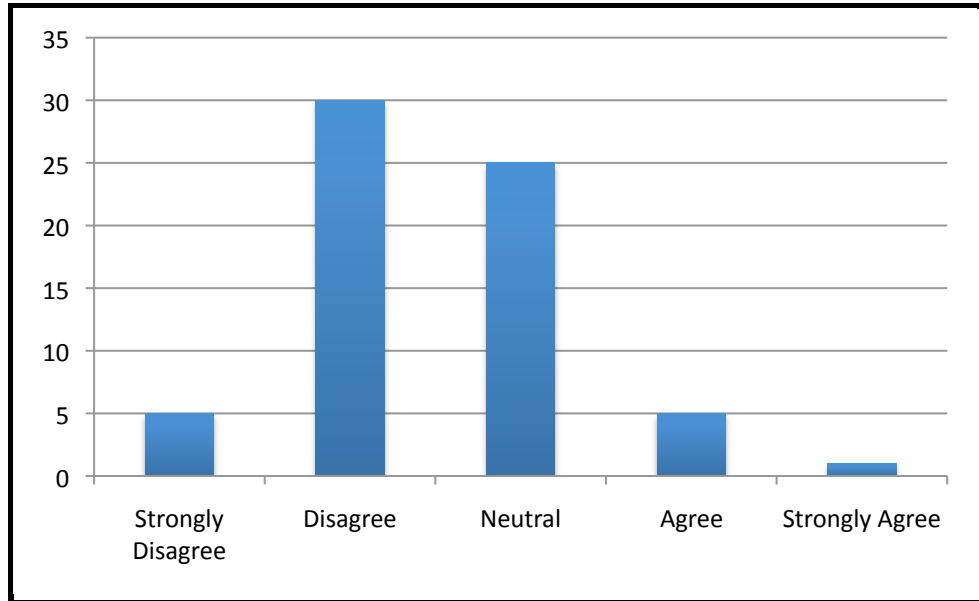
A majority of respondents disagreed that local food efforts are supported by business leaders and economic development agencies, many of whom do not view local agriculture or food systems as a viable investment for economic development resources. The potential for local agriculture and food systems to become significant generators of jobs and enterprises will continue to be limited without more significant financing and infrastructure. Including economic development agencies in future local food system efforts will be critical to realizing the economic potential of food re-localization.

Chart 28
Strong Stewardship of Natural Resources



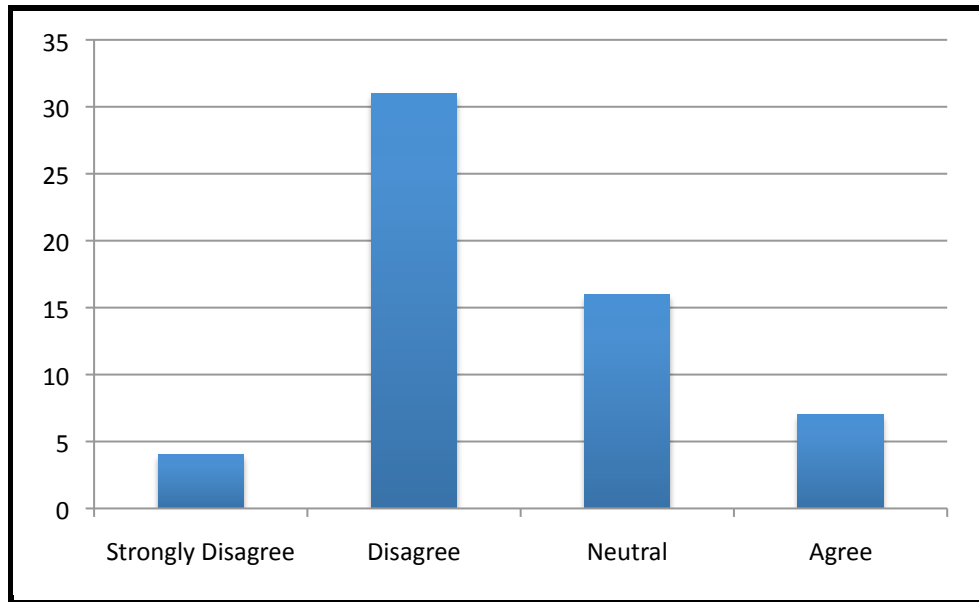
A significant proportion of respondents disagree about the stewardship of land and water resources in the region being strong. As an industry, agriculture continues to be a primary contributor to non-point source pollution in waterways. Industrial farming practices replace quality topsoil with chemical nutrient inputs, reducing topsoil and nutrient exchange capacities of agricultural land over time. Partnering with soil/water conservation districts and watershed planning efforts can continue to link a strong local food system with stewardship practices that improve the quality of soil and water resources over time. A variety of on-farm management techniques can also increase soil carbon (an indicator of topsoil quality), raising the capacity for farms to off-set carbon emissions of surrounding businesses, transportation systems, and municipalities.

Chart 29
Public Policy Supports Local Food



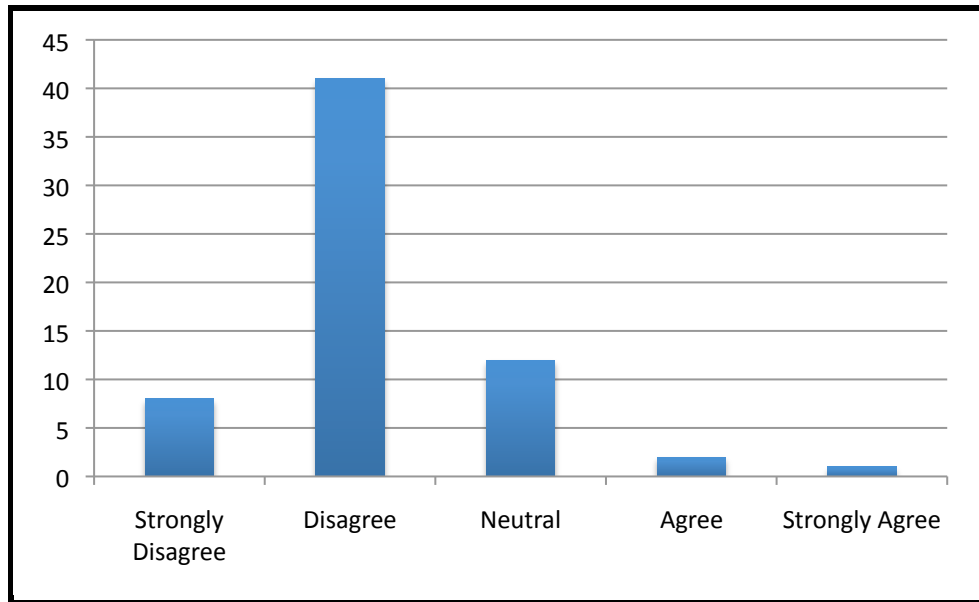
A significant proportion of respondents also disagree that public policies presently support local food systems development. Respondents particularly focused on federal policies and subsidy programs that favor larger producers and artificially distort prices for processed foods imported into the regional economy. Urban farmers in Cleveland cited difficulties working with City government to secure access to land and water resources to support farming. Food safety regulations were also cited as an area where liability and costs of compliance favor larger producers and create cost burdens on smaller producers. The rise in incidences of food contamination is leading to support for stronger food inspection and safety regulations. Ensuring the safety of food is a critical need, but can policies be designed that are not overly burdensome for smaller producers?

Chart 30
Training & Education Adequate



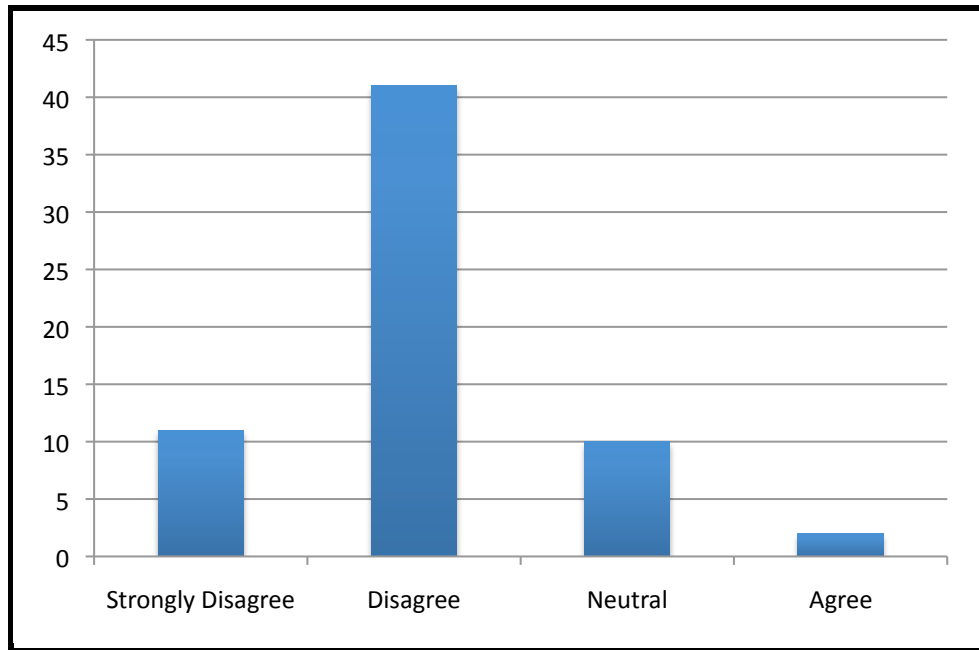
A significant number of respondents disagreed with training and education being adequate to their needs. As more people are drawn to participate and initiate new farming or food enterprises that serve the local food economy, how can they find opportunities to expand their skills, education, and knowledge of running small businesses and growing effectively? There are several positive programs in place with farmer-to-farmer mentoring and training offered through OSU Extension. The diverse base of local schools, community colleges, vocational schools, and colleges and universities in Northeast Ohio are developing curricula to train local food entrepreneurs and can all contribute new learning opportunities in this area.

Chart 31
Financial Resources Widely Available



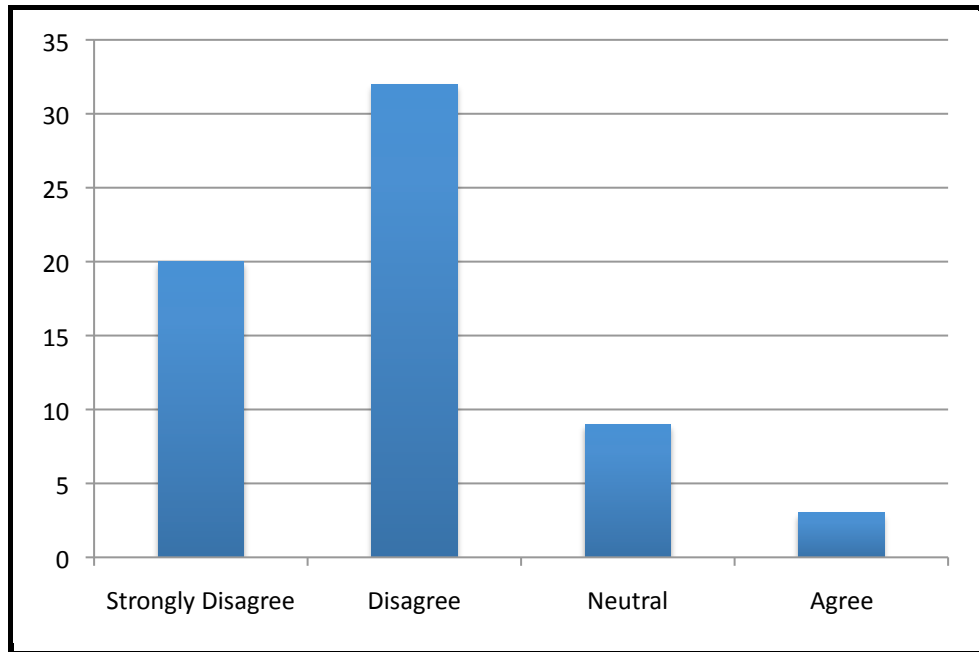
A significant number of respondents disagreed with the availability of financing for local food activities. Most of the financing needs expressed were focused on start-up capital and establishing the first phase of infrastructure needed for viability. For urban agriculture, the Gardening for Greenbacks initiative of the City of Cleveland and the Re-Imagining Cleveland program offer grants for the establishment of urban farm operations. These grants range from \$3,000 to \$20,000 and apply to putting small urban plots into agricultural production. While helpful for individual projects, there is a greater need for access to capital to support broader food systems development, including infrastructure for marketing, processing, aggregation and warehousing. These investments should be structured with the input and ownership of a broad range of growers, businesses, and end-consumers.

Chart 32
Strong Social & Economic Connections Between Rural and Urban



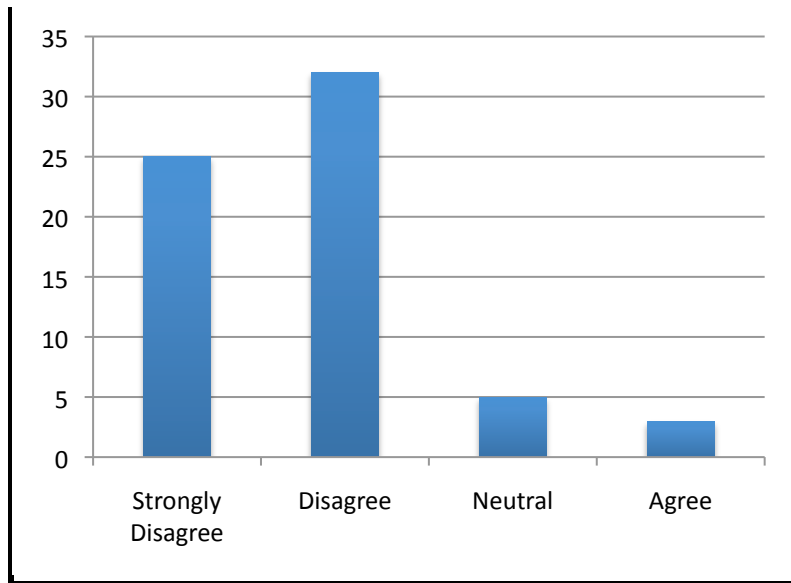
One of the areas of least confidence lies in the strength of rural and urban connections. The urban centers of Northeast Ohio provide the population densities necessary to create a variety of markets, both direct and wholesale. Rural areas have greater depth of production capacity, but more dispersed populations of growers and businesses. There are emerging opportunities in urban agriculture to provide high-value crops that can be grown in small-acreage settings, including greens, bee products, and select vegetables and fruits. Areas such as Wayne County have greater depth and capacity for meat and dairy production which require greater acreage. Identifying collaborative marketing initiatives, regional branding that captures both urban and rural producers, and shared-use facilities for processing and distribution can foster opportunities that can benefit both urban and rural growers. Farmers markets, community-supported agriculture initiatives and urban-based retail cooperatives can also provide more direct marketing opportunities which also encourage greater social mixing between urban and rural populations.

Chart 33
Processing & Distribution Resources Adequate



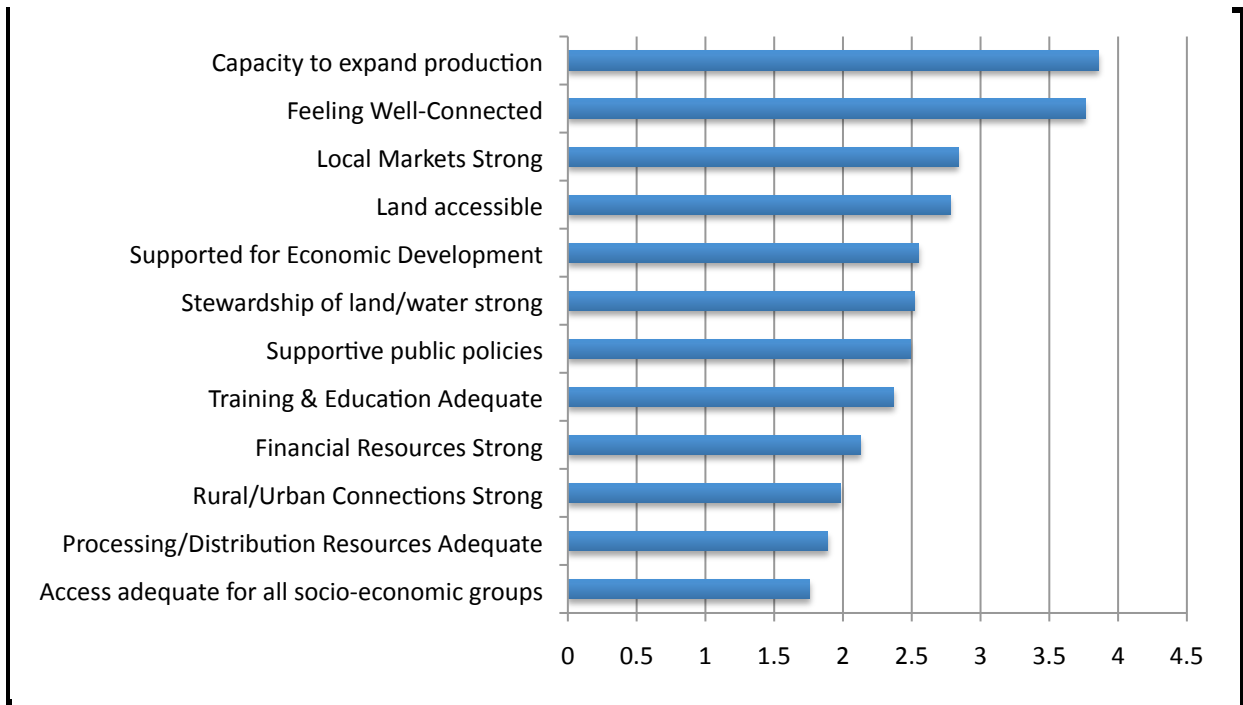
By far, one of the areas of least confidence is in facilities to support processing and distribution. Value-added processing will be a critical strategy, both for capturing greater profit margins and for extending the seasonal availability of local foods. Meat processing facilities more accessible to smaller and medium-scale livestock producers will also increase the availability of meat and dairy products for distribution to urban markets. Inefficiencies in current distribution systems continue to generate thin margins for food distribution enterprises. Cooperative distribution and aggregation centers can extend the reach of more dispersed producers, while improving distribution efficiency and price competition.

Chart 34
Access to Local Foods Available to All Socioeconomic Groups



The area with the least amount of confidence among respondents lies in making local food available to all socio-economic groups. Three primary barriers limit participation in the local food system for low-income residents, both urban and rural: economic barriers (healthy food is less affordable,) physical access (healthy food outlets are too far away,) and market demand (people are not seeking healthy local foods). Improving food access requires a close coordination between public education on nutrition and local food preparation. Strategies need to be developed and customized to meet the needs of both rural and urban communities identifying affordable price points that also support farmers and improvements in ease of access to local food outlets.

Chart 35
Confidence Levels on Critical Indicators



To summarize, the areas with the highest levels of confidence among individuals involved with local food activities include:

- Capacity to expand agricultural production to meet growing demand
- Individuals feeling supported and well connected with others
- Local markets strong and open
- Land reasonably accessible

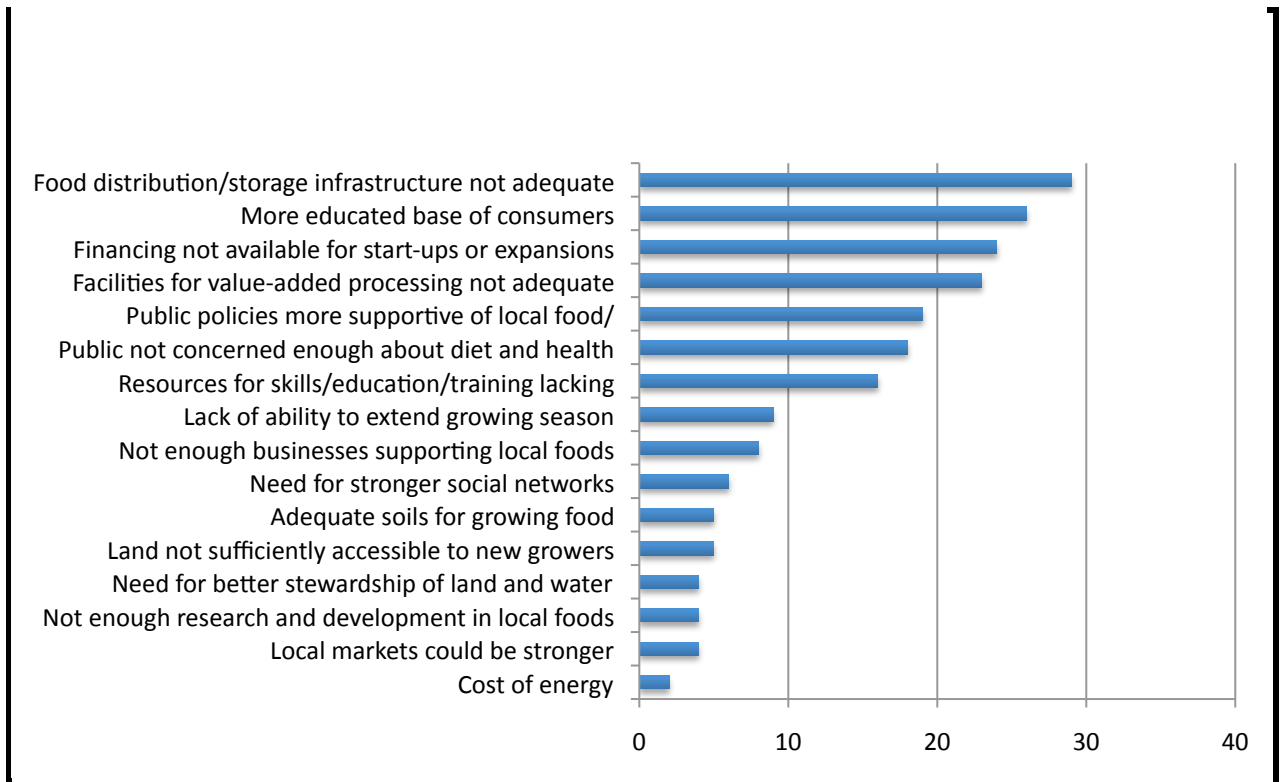
Areas that will require more focused attention include:

- Access for all socio-economic groups
- Gaps in processing and distribution resources
- Rural and urban collaborations
- Access to financing
- Training, education, and research aimed at improving production and processing

(5) Key Barriers

The project consultants developed a list of barriers based on their own SWOT analysis and knowledge of local food systems in Northeast Ohio. The respondents were asked to identify the three factors from a list that they felt were the most significant barriers to expanding local food activity. The graph below provides a prioritization of areas identified as the most significant barriers to local food activity:

Chart 36
Barriers to Expanding Local Food Activity



The barriers that require the most attention are focused mostly on infrastructure and capital issues as well as public education:

- Food distribution and warehousing not adequate
- Need for consumer education and local food branding
- Financing gaps for start-ups or expansions
- Facilities for value-added processing not adequate

The second tier of topics focused mostly on policy and programming issues:

- Public policies need to support and favor local food systems
- Limited public concern about diet and health issues
- Resources for skills/education/training are lacking

The third tier of issues were of less concern among respondents as critical barriers:

- Lack of ability to extend the growing season
- Not enough businesses supporting local food
- Need for stronger social networks
- Adequate soils for growing food
- Land not sufficiently accessible to new growers
- Need for better stewardship of land and water
- Not enough research and development in local food systems
- Local markets could be stronger
- Costs of energy

(6) Key Discussion Areas

To most effectively grow local food systems in the region, we need to address:

- The baseline motivations and interests for local food work;
- The critical assets necessary for success
- Maintaining and improving areas with the greatest strength
- Focusing resources and capacity on the areas of greatest weakness
- Overcoming critical barriers to success

The baseline motivations for local food systems, identified by a sampling of those most active in developing them, lie in quality of life factors (stronger communities, public health outcomes, civil society, and equity in access) and economic factors (retaining dollars, creating jobs, stimulating local businesses). Although less of a motivation, the ecological sustainability of farm and food enterprises will be critical to their long-term viability. Ecological sustainability can serve as a critical design principle embedded into all aspects of the food system (ecological forms of agriculture, waste-reutilization, energy efficiency, reductions in carbon emissions, carbon sequestration, alternative energy and fuels, water quality, and biological diversity).

The assets identified as most critical to success include:

- access to start-up capital to support infrastructure for year-round local food availability (including season extension on the farm and processing and distribution facilities off-farm),
- the skill and knowledge sets needed to create ecologically sustainable and profitable farm and food enterprises,
- social networks that build capacity for collaboration between urban and rural growers, supporting businesses, and policy, educational and financing resources;
- land to support agricultural production, including a mix of private, cooperative or shared, and leased land with provisions for long-term access; and



- diversified markets that can provide opportunities for direct marketing and social mixing between consumers and growers and more high-volume wholesale markets for institutions or businesses.

The areas of greatest strength include:

- Strong support networks
- High capacity for expanding production
- Accessible land for production, and
- Strong markets

The areas of greatest weakness include access to:

- Markets that serve mainstream consumers;
- Collaborative connections between urban and rural communities;
- Physical facilities and businesses or cooperatives to support processing, storage, and distribution, and
- Financial resources

The most critical investments, policies, and activities that will need to be comprehensively addressed include:

- Marketing and education campaigns that improve public support for and ability to participate in local food systems, with emphasis on reaching more mainstream and low-income consumers that are not participating in the local food system;
- More accessible financing for start-ups, expansions, and shared infrastructure that can stimulate further growth and activity, including primary production, supporting businesses, and consumers and businesses;
- More infrastructure for supporting value-added production and processing, accompanied by the training and management to maintain those facilities that support the growth of the enterprises that utilize local food ingredients.

