

FARMERS' MARKET AND LOCAL FOOD PROMOTION PROGRAM (FMLFPP)

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Date Report Submitted	June 17, 2019
Grant Agreement Number: <i>(e.g. 14-LFPPX-XX-XXXX)</i>	AM170100XXXXG088
Recipient Organization Name:	North Union Farmers Market
Project Title as Stated on Grant Agreement:	Developing the Farm-to-Institution Market for Northeast Ohio's Family Farmers
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Year Grant was Awarded:	2017
Amount of Award:	\$100,000

FMLFPP staff may contact you to follow up for long-term success stories. Who may we contact?

Same Authorized Representative listed above (check if applicable).

Different individual: Name: _____; Email: _____; Phone: _____

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1. Executive Summary—In 200 words or less, describe the project’s need, purpose, goals, and quantifiable outcomes:

North Union Farmers Market created the planning program *Developing the Farm-to-Institution Market for Northeast Ohio’s Family Farmers* in an effort to connect the demand for fresh, locally sourced agricultural products with the need to provide stable revenue streams for the region’s family farms. This program sought to increase consumption of regional farm products by connecting small and mid-sized farms with wholesale institutional clients including; hospitals, restaurants, schools, and catering companies. Planning the expansion of our services addressed the ongoing need to stabilize and grow revenues for regional farmers. This planning project helped develop a robust farm-to-institution program in Northeast Ohio.

Our goals for this planning project included creating awareness about wholesale product purchases, developing systems to facilitate sales between institutions and family farms, and addressing the training needs of farmers entering wholesale production and marketing. Outcomes accomplished through this planning grant were: 1) Created awareness about wholesale purchases at regional institutions; 2) Developed a multifunctional website to coordinate purchases between institutions and farm businesses; 3) Trained 54 farms in wholesale production and GAP certification; 4) Planned a wholesale pilot program connecting area farms with institutions and restaurants; and 5) Developed a database of regional farms to participate in wholesale markets.

2. Please provide the approved project’s objectives:

Objectives		Completed	
		Yes	No*
1	Identify and research farmers and institutions within 16-county region surrounding our food hub location.	X	
2	Engage tech firm Pandata to facilitate the survey design and follow-on analysis of data to support launch of a farm-to-institution sales program within a new local food hub.	X	
3	Create a multifunctional website for procurement of sales and logistics.	X	
4	Design, produce, and distribute marketing materials for promoting the program to prospective farms and institutional buyers.	X	
5	Training conducted with consultant to prepare North Union Farmers Market staff for farmer training.	X	
6	Farmers Training Conference including workshops of food safety requirements, scaling productions for wholesale markets; storage, transportation and packaging; marketing to institutional clients; GAP and organic certifications.	X	
7	Launch pilot for farm-to-institution sales during peak 2018 growing season.	X	
8	Analyze results of pilot; incorporate lessons learned into final business plan for Farm-to-institution sales component of new food hub.	X	

**If no is selected for any of the listed objectives, you must expand upon this in the challenges section.*

3. List your accomplishments for the project’s performance period and indicate how these accomplishments assisted in the fulfillment of your project’s objectives. Please include additional objectives approved by FMLFPP during the grant performance period, and highlight the impact that activities had on the project’s beneficiaries.

Accomplishments	Relevance to Objective, Outcome, and/or Indicator
	<i>Example: Activities developed are related with our 3rd Objective, Outcome 1, and indicator 2b.</i>
Successfully reached out to approximately 200 farms and 250 restaurants through in-person recruitment at markets and conferences, call lists, direct mail, and electronic-blasts to participate in wholesale food hub. Bulk food sales channels were developed through this planning process. This information was used to facilitate Objective 7.	Activities developed are related to Objective 1, Outcome 1, indicator 1b-c, and Outcome 6, indicator 6a. Sample email blasts are attached as Figures 1 and 2, below.
Conducted engagement activities with institutions interested in participating in wholesale food hub. Worked to answer questions and create awareness around purchasing locally produced products in bulk form. This information was used to facilitate Objective 7.	Activities are related to Objective 1, Outcome 2, and indicators 2a-b and Outcome 6, indicator 6a.
Developed a multifunctional website for procurement of sales and logistics. Planned and designed website for future implementation of the bulk food sales program; aligning all web content with in-season products and regionally-specific information about local foods and pricing.	Activities developed are related to addressing Objective 2, Outcome 1, indicators 1a-c, Outcome 2, indicators a-b, Outcome 3, indicator 3f, and Outcome 6, indicator 6a.
Devised and implemented a multifaceted marketing program to engage both farmers and institutional customers. Strategies included creating a database of farm businesses and institutions, networking and in-person outreach, as well as emails, and phone. Involved farmers in bulk production and marketing practices and devised strategies to teach institutions about regionally produced foods, including how to prepare regionally grown agricultural products. Work was conducted in-person at farmers market sites and at farms, and through phone coordination.	Activities are related to Objective 4, Outcome 1, indicators 1a-c, Outcome 2, indicators 2a-b, and Outcome 6, indicator 6a.
Successfully completed consultancy for Good Agricultural Practices (GAP) farmer training. Engaged staff members by enhancing their skills and knowledge to serve family farmers and institutional buyers in efficient and industry compliant bulk sales and production practices.	Activities completed are related to Objective 5, Outcome 4, and indicators 4a-c.
GAP training was conducted in March 2018, successfully trained 54 participants. Training taught regional farmers about food safety practices, packaging, and transport. Full day training also taught farmers about pricing and scaling production to meet institutional demand through wholesale activities.	Activities completed are related to Objective 6, Outcome 4 indicators 4a-c, and Outcome 5, indicators 5a-c.
Activities included successfully launching one pilot year for wholesale market efforts. Initially, 15 institutions including hospitals, restaurants, and a catering company agreed to purchase locally sourced	Activities developed are related to Objective 7, Outcome 1, indicators 1a-c, Outcome 3, indicator 3f-h and 3j, and Outcome 6, indicator 6a.

<p>agricultural products through North Union Farmers Market farm to table pipeline. We contracted with 35 farmers to supply products for wholesale market efforts. These activities helped local farmers begin wholesale production practices. The purpose of these activities included planning the program and learning systems and best practices to continue this work in the future in an effort to increase profits for local family farmers. Data used from this pilot program has been analyzed to ensure the program will be able to scale and reach future goals. Results detailed below.</p>	
<p>Grant activities included identifying, selecting, and committing to work with restaurants for the 2019 season- increasing and enhancing farm to restaurant sales. This networking and planning assisted with the marketing of our program and services, while continuing to create demand for locally produced food products. This will ensure there is a market for farmers who are transitioning their production to include wholesale products from the skills and practices they have learned through our trainings.</p>	<p>Activities related to Objective 7, Outcome 2, indicators 2a-b and Outcome 6, indicator 6a. s</p>
<p>A bulk food sales program was successfully piloted during the 2018 growing season with 36 farms participating, 9 restaurants, 3 large institutions, and 1 catering company (unfortunately, the other potential customers ultimately did not participate in the program during the pilot session). Lessons learned included how to better operationalize bulk sales. Results from this pilot season continue to be analyzed and incorporated into a more successful and efficient business model for our farmers and customers throughout the region.</p>	<p>Activities related to Objective 8, Outcome 6, and indicators 6a.</p>
<p>Networked and recruited farmers to participate in bulk food and wholesale programs through conference attendance and soliciting applications from farmers. Attended four conferences reaching 140 farm businesses with 20 farms applying to the program as a result. Conferences included 1) Ohio Produce Growers Marketing Association 35 farmers contacted through this outreach effort, 6 farms applied; 2) Mid-Ohio Growers Association, reached 30 farms, 10 farms applied to the program; 3) Ohio Farm Bureau Young Agriculture Professionals winter Leadership Conference, 40 farmers reached, 2 farms applied to the program; 4) Ohio Ecological Farming and Farming Association Conference, reached 35 farms, 2 applied to the program.</p>	<p>Activities developed are related to Objective 1, Outcome 1, indicator 1b-c, and Outcome 6, indicator 6a.</p>

4. Please list any challenges experienced during the project's period of performance. Provide the corrective actions taken to address these issues.

Challenges (Issues)	Corrective Actions and/or Project Changes (s)
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<p>Wholesale buyers from larger institutions including local universities were hesitant to commit to the program because of its newness. We answered many questions from these potential buyers and continue to create awareness about the program and its benefits.</p>	<p>Created a credible track record of sales during the pilot program that will be used with institutional buyers in 2019. We also work closely with the management of larger institutions such as the Cleveland Clinic to understand their buying needs. We have learned that management plays a large role in the purchasing of local and regionally produced farm products. In the future, we hope to continue meeting the needs of institutional customers and will work to educate buyers about how to purchase, use, and access local food through the systems we have created and plan to sustain.</p>
<p>Difficulties were encountered while designing the website. Specifically, our design team was not as responsive to our needs as we had anticipated. Contracting with an outside vendor, we realized that they were not aware of the industry-specific needs and nuances of our work.</p>	<p>We continue to work with website team and plan to have the website functional for the 2019 growing season. The website has been created and designed, but not implemented as of yet. We also took a portion of this work in-house to complete the regionally specific aspects of the website that were not completed by the outside vendor.</p>
<p>There was initial resistance and skepticism on the part of larger institutional buyers. At the outset, it was also difficult reaching some potential institutional buyers as they did not feel comfortable entrusting orders to a new operation without a known track record of production of this scale.</p>	<p>We continue to work with this concern and one strategy we are using to address this issue includes creating a successful relationship with a large buyer and showing our ability to meet the demand for local food products. Additionally, we also received orders from many Cleveland small to mid-sized restaurants and catering orders. Looking to the future, we will be implementing the planned marketing campaign and hope to open more accounts for the summer of 2019. The campaign includes press releases, point of sale materials, and in-person selling. This will enhance our legitimacy, increase greater public awareness, and present professionalism when meeting with larger institutions.</p>
<p>There was a smaller than anticipated order volume. We realized that some restaurants and businesses were not ordering amounts that were reasonable or sustainable for the farms. For example, farmers needed \$200.00 in weekly bulk sales to cover their costs and make a profit. Some vendors were ordering less, and it was making our program unsustainable.</p>	<p>We created a marketing campaign and adopted operation and sales strategies to continue this program. We continue to network to contract with additional clients, ensuring there is a demand to meet the wholesale production on the part of regional farmers. Through our outreach and educational efforts, vendors understand our ordering processes and the volume that is required for sales to be sustainable.</p>
<p>Communicating with buyers and producers was challenging.</p>	<p>We streamlined our communication efforts by hiring a Coordinator to organize the bulk food program. Communication issues between producers and consumers were resolved through direct and in-person communication.</p>
<p>Difficulties in operationalizing volume sales between farmers and institutions. The farms require an order size of at least \$200 to cover their costs</p>	<p>In the future, we will use a cluster and anchor strategy to allocate our prospecting efforts. This strategy calls for identifying potential accounts that</p>

<p>and expenses (i.e. gas, mileage, etc.). Operational inefficiencies resulted from increased pick-up and delivery time spent by staff.</p>	<p>are located in geographic proximity to existing accounts to create a “cluster” or on the delivery route to larger “anchor” institutions. When implemented, it should increase the efficiency of deliveries.</p>
<p>Finally, we experienced some communications difficulty with both buyers and farms at the beginning of the program and for the first few weeks of the program did not receive any replies to our program applications.</p>	<p>We revised our communication methods and began to receive applications. We also created a marketing plan that included outreach at conferences. This enabled us to reach 20 farm businesses, 10 of which are new farm businesses who will benefit from the additional revenue streams that can be obtained through wholesale activates.</p>

5. Quantify the overall progress on the outcomes and indicators of your project. Include further explanation if necessary.

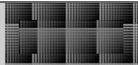
Outcome 1: To Increase Consumption of and Access to Locally and Regionally Produced Agricultural Products.

Indicator	Description	Number
1.	Total number of consumers, farm and ranch operations, or wholesale buyers reached	500
1.a.	The number that gained knowledge on how to buy or sell local/regional food OR aggregate, store, produce, and/or distribute local/regional food	335
1.b.	The number that reported an intention to buy or sell local/regional food OR aggregate, store, produce, and/or distribute local/regional food	200
1.c.	The number that reported buying, selling, consuming more or supporting the consumption of local/regional food that they aggregate, store, produce, and/or distribute	300
2.	Total number of individuals (culinary professionals, institutional kitchens, entrepreneurs such as kitchen incubators/shared-use kitchens, etc.) reached	250
2.a.	The number that gained knowledge on how to access, produce, prepare, and/or preserve locally and regionally produced agricultural products	250
2.b.	The number that reported an intention to access, produce, prepare, and/or preserve locally and regionally produced agricultural products	100
2.c.	The number that reported supplementing their diets with locally and regionally produced agricultural products that they produced, prepared, preserved, and/or obtained	N/A

Outcome 2: Increase Customers and sales of local and regional agricultural products.

Indicator	Description	Number
2.a.	Sales increased as a result of marketing and/or promotion activities during the project performance period.	
	Original Sales Amount (in dollars)	N/A
	Resulted Sales Amount (in dollars)	7121.50
	Percent Change $((n_{\text{final}} - n_{\text{initial}}) / n_{\text{initial}}) * 100 = \% \text{ change}$	N/A
2.b.	Customer counts increased during the project performance period.	
	Original Customer Count	0
	Resulted Customer Count	12 contracted
	Percent Change $((n_{\text{final}} - n_{\text{initial}}) / n_{\text{initial}}) * 100 = \% \text{ change}$	N/A

Outcome 3: Develop new market opportunities for farm and ranch operations serving local markets.

Indicator	Description	Number
3.	Number of new and/or existing delivery systems/access points of those reached that expanded and/or improved offerings of	
3.a.	Farmers markets	
3.b.	Roadside stands	
3.c.	Community supported agriculture programs	
3.d.	Agritourism activities	
3.e.	Other direct producer-to-consumer market opportunities	1
3.f.	Local and regional Food Business Enterprises that process, aggregate, distribute, or store locally and regionally produced agricultural	1

Indicator	Description	Number
2.	Number of local and regional farmers and ranchers, processors, aggregators, and/or distributors that reported	
3.g.	An increase in revenue expressed in dollars	9
3.h.	A gained knowledge about new market opportunities through technical assistance and education programs	100
3.	Number of	
3.i.	New rural/urban careers created (Difference between "jobs" and "careers": jobs are net gain of paid employment; new businesses created or adopted can indicate new careers)	N/A
3.j.	Jobs maintained/created	30
3.k.	New beginning farmers who went into local/regional food production	N/A
3.l.	Socially disadvantaged famers who went into local/regional food production	N/A
3.m.	Business plans developed	1

Outcome 4: Improve the food safety of locally and regionally produced agricultural products.

Only applicable to projects focused on food safety!

Indicator	Description	Number
4.a.	Number of individuals who learned about prevention, detection, control, and intervention food safety practices	65
4.b.	Number of those individuals who reported increasing their food safety skills and knowledge	45
4.c.	Number of growers or producers who obtained on-farm food safety certifications (such as Good Agricultural Practices or Good Handling Practices)	65

Outcome 5: To establish or expand a local and regional food business enterprise.

Indicator	Description	Goal	Actual
5.a.	Number of unmet consumer needs, barriers to local foods, unserved populations, etc. identified through the use of a comprehensive needs assessment when developing a plan to establish or expand a local and regional food business enterprise.	5	9
5.b.	Number of plans for establishing or expanding a local and regional food business enterprise developed based on a comprehensive needs assessment.	1	1
5.c.	Amount of non-Federal financial, professional, and technical assistance measured in dollars secured as a result of the developed plan(s) to establish or expand a local and regional food business enterprise.	\$18,000	\$18,000

Outcome 6: To increase the amount of local agricultural products procured by Northeast Ohio institutions.

Indicator	Description	Goal	Actual
6.a.	Number of institutions committing to add or increase procurement of local farm product	15	12 contracted

6. Discuss your community partnerships (include applicant staff and external partners).
 - i. Who were your community partners?
 - ii. How did they contribute to the overall results of the FMLFPP project?
 - iii. How will they continue to contribute to your project's future activities, beyond the performance period of this FMLFPP grant?
 - iv. What feedback have the partners provided (specific comments) about the results of the project?
 - *Executive Director North Union Farmers Market:* Facilitated partnerships, program planning, program development, and managed staff.
 - *Outreach and Development Manager, North Union Farmers Market:* Coordinated farmer trainings and marketing planning activities such as coordinating with website design and data firm. Had served as grant manager for portion of the project (has since left our organization).
 - *Event and Market Manager, North Union Farmers Market:* Managing the day to day operations of the bulk food project. Additionally, responsible for the logistics of the growing conference, supplies, and rentals, to day-of management, set up, and take down.
 - *General Manager, North Union Farmers Market:* Oversaw program operations related to market planning and development for the bulk food program at farmers market sites.
 - *Bookkeeper, North Union Farmers Market:* Coordinated bookkeeping related to project and expenses.
 - *Vice President, North Union Farmers Market Board of Directors:* Expertise in marketing and public relations to the project, providing guidance on our print and electronic communications, as well as helping us work with the web designers.
 - *Contractor, Bulk Food Program, North Union Farmers Market:* Assisted in coordinating communications between farmers and restaurants, assisting with activities related to the website design for the bulk food program.
 - *Lead Trainer, FamilyFarmed Wholesale Success Program:* Trained farmers in GAP certification.
 - *Partner and Principal Data Scientist, Pandata:* researched area farms that could participate in the bulk food program, helping enhance marketing opportunities for local farms.
 - *Epstein Design Partners:* Website design firm assisting with creating a platform for producers and consumers to connect and buy goods online and in-person.
 - *City of Cleveland:* Representatives from the city's sustainability department participated in GAP training presentation, learning about bulk food sales and connecting local producers with more of the city's businesses and nonprofits.
 - *Coral Company:* donated the space for training presentation to 87 farms, City of Cleveland staff, Chefs, Distributor (Premier Produce-)
 - *Local Chefs:* While local chefs have always patronized our farmers markets, through this project we did direct outreach to several to educate them about the new program, and nine ultimately became clients, some purchasing regularly, and others for special events through direct sales for holiday events. Their businesses ranged from smaller local restaurants, like Fire and Mama Santas, to larger nonprofits, like the Cleveland Clinic, and even local food industry giant Nestle. We also contracted with Cleveland's newest indie music festival, InCuya.
 - *Premier Produce:* Representatives from Premier came to our annual grower's

conference where they shared their expertise on best practices and technical training on bulk food sales.

North Union Farmers Market (NUFM) staff will continue in their roles supporting farm to institution efforts into the future, coordinating the continuation and expansion of the bulk food program to increase sales of locally produced foods in the Greater Cleveland Area. Coral Corporation will continue to supply physical space for the Bulk Food Tuesday pilot program, storage facility, truck and van parking, as well as office space. NUFM will continue to work with area restaurants and institutions on increasing sales of locally produced agricultural products through coordinated efforts with efficient intermediary support.

Partners of our program “*Developing the Farm-to-Institution Market for Northeast Ohio’s Family Farmers*” provided us with essential feedback that assisted in the coordination and design of this planning project. People from area farms stated they need avenues to sell their product at fair prices within the region. We learned that there is a need to increase sales and income for farmers living below the poverty line and that area institutions and restaurants have a need and demand for locally produced agricultural products. As a direct producer to consumer market, we used our network and skills to coordinate these efforts. Situated in the context of our farmers market network, we were able to have direct conversations and obtain feedback from farmers, as well as interested buyers, who offered ideas to improve our program.

Interest in the program has increased and now there are farmers and restaurants contacting us directly for sales instead of us needing to reach out to them first.

7. How do you plan to publicize the results?
 - i. To whom (i.e. people, entities) do you plan to publicize the project results?
 - ii. When do you plan to publicize the results?

*If you have publicized the results, please send any publicity information (brochures, announcements, newsletters, etc.) electronically along with this report. Non-electronic promotional items should be digitally photographed and emailed with this report (do not send the actual item).

North Union Farmers Market has numerous methods of disseminating the results of this project. The planning process allowed for the development of a “Harvest” website where information about the bulk food program will be accessible (see figure 1). The website was completed in February 2019 and went live in March 2019.

NUFM will include information about our wholesale operations in all ongoing and upcoming marketing and promotional materials, in our annual report to the community, on our web site, and in our email marketing blasts. Additionally, both NUFM’s Executive Director and General Manager regularly give presentations, lectures and participate in panel discussions about our markets and programming. At the end of last year’s growing season, we prepared a brief report to our stakeholders informing them about the program, and have included it as Attachment 1. We will share a more comprehensive report to the community when the website is fully operational, likely in August 2019.

Finally, we have attached a copy of this season’s bulk food flyer (see Attachment 2).

8. Have you collected any feedback from your community and additional stakeholders about your work?
 - i. If so, how did you collect the information?

ii. What feedback was relayed (specific comments)?

The planning process made possible through this grant allowed us to gain insights from our community as we worked to create a comprehensive regionally-specific marketing plan to enhance the revenues of small and mid-sized family farms. We collected feedback in a number of ways including a survey of our GAP training participants, 1:1 calls and in-person visits to farms and institutions, and through ongoing direct conversations with producers and consumers at the weekly farmer's market.

In the process of creating a wholesale pilot program, we collected information from farmers including the products they have available for sale, what land assets they have available to scale production, and what profit margins they need to reach to make a profit from the program, and address overproduction of certain products at various times in the growing season. Farmers also offered feedback regarding reducing/eliminating on-farm waste and discussed how selling bulk or surplus items to a larger institution could be both profitable and reduce on-farm waste.

Farmers working in the program indicated that they need larger volume-sales per order to make wholesale work for their operation. They indicated that each sale needs to be approximately \$200.00 for them to cover their costs and make a profit from the sale. We also learned through this planning process that there are specific needs for different products and that these needs must be clearly communicated between farmer and consumer. For example, kale has to be harvested and transported earlier in the day or it can experience wilting. In essence, we learned the ins and outs of good communication and timing for products to reach the institutional buyers and restaurants.

In this planning phase, we also had the opportunity to speak directly with restaurants and wholesale clients to understand their parameters and needs. We collected information that included the specific timing needs of the restaurants, when they can receive deliveries, and how their ordering processes work. For example, restaurants shared that deliveries needed to be made at times in the afternoon before their dinner hours. Collecting this data enabled us to create a program that meets the needs of area restaurants and institutions, as well as the farmers.

Farm businesses indicated that our communication systems are easy to work with. They also noted that the support they received delivering their products is helpful to their businesses and has enabled them to make a profit from the wholesale program and reduce on-farm waste.

Small restaurants interested in local food have indicated that our wholesale program is easier to work with than larger distributing companies. For example, larger distributing companies might deliver produce during their business hours of operation when they are seating and serving customers. Since we are a smaller operation, we are able to communicate more effectively with the restaurants and are able to work with, and accommodate, their schedules.

Farmers located further from the urban areas indicate that it is difficult for them to access, market, and sell their products in more dense urban areas. They have given us feedback that the bulk food program allows them to interact with buyers and restaurants in the more dense urban areas and this is a service to them and is helping them increase sales.

Participants from farms stated they were able to make, on average, an additional \$200.00 weekly profit from this program. For a six-month program this could mean an

approximate 10% increase in annual profits for a small family farm with an annual farm income of \$50,000. For the percentage of small and new farms who may be participating in the program, this represents a significant income increase for their operation.

9. Budget Summary:

- i. As part of the LFPP closeout procedures, you are required to submit the SF-425 (Final Federal Financial Report). Check here if you have completed the SF-425 and are submitting it with this report: X Yes
- ii. Did the project generate any income? Yes No
 - a. If yes, \$7121.50 generated and how was it used to further the objectives of this project? It was reinvested to further our project goals through increased mixed media marketing, mailing materials, postage, logo t-shirts, crates for delivery, cell phone bill, and mileage which had a high cost of delivery from farm to end purchaser averaging \$800-\$99 per month. We have now built a system of drop off and pickups that lowered that cost.
- iii. In the table below include the total amount of **federal funds spent** during the grant performance period (**Do not** include matching or in-kind contributions):

Categories	Amount Approved in Budget	Actual Federal Expenditures (Federal Funds ONLY)
Personnel:	29,249.88	29,249.88
Fringe:	5,079.80	5,079.98
Contractual:	41567.00	47,517.00
Equipment:		-0-
Travel:	1,728.00	1,879.17
Supplies:	9,800.00	-0-
Other:	4682.50	1,257.50
Indirect Costs:	7892.82	-0-
TOTAL:	\$100,000.00	\$84,983.53

Please note: the variances in our line items reflect the following:

Travel: Increases in the mileage reimbursement rate, and more on-site meetings during the recruitment phase.

Pandata: Additional charge of \$750 for the purchase of a farmer mail list, again should have been categorized in “other” in our previous financial reports.

FamilyFarmed: In addition to their services leading our training, we contracted with FamilyFarmed for the purchase of training manuals, which had been included in our request under Supplies. Because they included the purchase price in their other invoice, our bookkeeper was unaware that the manuals should have been credited to the Supplies line, and inadvertently reported them under Contract. We paid \$4,800 toward their cost, and the Farm Bureau provided the remaining funds as part of their ongoing generous support for our programs.

Indirect costs: We elected not to apply for reimbursement for our indirect costs, as many of the project’s activities were also beneficial

for our core farmers market programming.

- iv. **ONLY for LFPP recipients:** Provide the amount of matching funds/in-kind contributions used during the grant performance period.

Categories	Match Approved in Budget	Actual Match Expenditures
Personnel:		
Fringe:		
Contractual:	2,500.00	2,500.00 PA 8/2/2019
Equipment:		
Travel:		
Supplies:		
Other:	40,000.00	40,000.00
Indirect Costs:	849.65	849.65 PA 8/2/2019
TOTAL:	\$43,349.65	\$42,000.00 40,000 PA 8/2/2019

10. Lessons Learned:

- i. Summarize any lessons learned. They should draw on positive experiences (e.g. good ideas that improved project efficiency or saved money) and negative experiences (e.g. what did not go well and what needs to be changed).
- ii. If goals or outcome measures were not achieved, identify and share the lessons learned to help others expedite problem-solving:
- iii. Describe any lessons learned in the administration of the project that might be helpful for others who would want to implement a similar project:
- iv. Discuss if and how the result of this project can be adapted to other regions, communities, and/or agricultural systems.

In this 18-months of planning we learned how to manage, coordinate, and successfully transport fragile, fresh, and local foods in Northeast Ohio. It was important that we developed and implemented proper procedures for storage and appropriate refrigeration to reduce waste. We learned that each product has its own unique ability to withstand light, temperatures, and humidity and must be cared for accordingly. We sought to be a trusted partner in the community and worked to build our capacity slowly and effectively during this first year of the program. Through persistent and direct communication with stakeholders, we continuously received feedback and made deliberate improvements. During the planning process we learned how to manage larger sales to institutions which differed from individual sales at the market. Larger institutions required additional buy-in before committing to our program as a vendor, however once we had established a track record in the community, larger institutions more readily signed on. Using an iterative process to improve our overall communication, marketing, and coordination strategies we created successful systems to manage the needs of our farmers, balancing those needs with the demands of regional consumers. Creating and maintaining these systems required time and personnel to build and foster relationships, and ultimately feedback from growers and consumers in the area greatly shaped the program for future implementation.

Marketing foods for institutional sales, we learned that buyers often need to be educated about how to prepare products they have not previously used. This issue was highlighted at the GAP training, as regional farmers learned about processing foods in a way that is compatible with the institutional needs of wholesale clients. We learned how and why the needs of wholesale clients differ from farmers market customers (who are the normal clientele of our regional small and mid-sized farmers). This lesson is applicable to all areas of the United States where institutional needs will differ from those of a household

consumer regardless of the product. Such training also highlighted to farmers ways that they could reduce or eliminate on-farm waste by matching a surplus of product with an institutional consumer who would purchase it.

During the pilot program we learned a major lesson about understanding how and when to communicate with the farms and area businesses. For example, farmers prefer to communicate in the morning, whereas restaurants often communicate in the evening. We noticed that farmers would reach out to us at 5:30 AM, whereas the restaurants might reach out at midnight. Both farmers and those in the restaurant/catering business spend limited time in front of computers and are often reached best over the phone and in-person, but might have limited availability for when they can respond. There was a great deal of nuance serving as an intermediary for sales and we learned a nimble approach to bringing these two groups together. Ultimately for those who wish to replicate a program like ours, we recommend having dedicated resources for a staff member who can build relationships amongst the growers and consumers alike.

A database of farmers and businesses interested in wholesale networking was created in the initial planning stages of the program. When we initially reached out to farms we had difficulty recruiting applicants to the program. As a result, we revised our marketing plan to include attending conferences for in-person networking. By attending conferences we were able to meet with 140 farm businesses directly, have dialogue about our program, and answer individual questions in-person and efficiently. Once farmers met with us directly and learned about the program, there was more buy-in that we could be a trusted resource that could improve their business both through increasing profits and reducing on-site waste. Through conference attendance we gained valuable insights about the farm businesses interested in participating in wholesale, and also recruited many new farms. Through this process, we learned that there is a great need to do in-person communicating and networking while building this type of program within our region.

For others interested in conducting similar work in others regions we advise adopting an approach similar to ours: to the extent possible, develop relationships with suppliers and consumers in advance; work with a reputable and experienced consultant on program development; begin on a smaller scale to mitigate risk and challenges; and visit as many similar enterprises as possible to gain insight into what works and what doesn't. We recommend dedicating resources to employ a Coordinator who can facilitate on-the-ground communication with family farmers and business owners. We realized through this planning process that regional market development is highly relational work and requires specific and personal conversations to provide information to small and mid-sized farms who would like to 1) increase their revenue streams through adding wholesale buyers to their sales and 2) are interested in selling their products for a fair price while eliminating on-farm waste. Similarly, having a Coordinator is helpful for recruiting additional institutional customers and clients. Buyers that are new to wholesale with regional farms had many questions and may require more staff time to address in the beginning stages. Having someone on staff who can speak to those concerns in a time and manner that works for both farmers and consumers can greatly contribute to the success of the project.

1. Future Work:

- i. How will you continue the work of this project beyond this grant? In other words, how will you implement the results of your project's work to benefit future community goals and initiatives? Include information about community impact and outreach, anticipated increases in markets and/or sales, estimated number of jobs retained/created, and any other information you'd like to share

- about the future of your project.
- ii. Do you have any recommendations for future activities and, if applicable, an outline of next steps or additional research that might advance the project goals?

North Union Farmers Market completed essential work to develop, plan, and create pathways for family farms to sell produce and agricultural products to expanded markets in Northeast Ohio. Through these planning efforts, 54 farmers were trained in GAP Certification, we developed a website to facilitate farm to institution sales, and essential data was collected to ensure that farmers were reached to learn about selling their goods while institutional buyers and restaurants were contacted and educated about our program. Mixed media marketing materials were developed to create awareness of the program.

At this time, North Union is poised to implement an effective, efficient, coordinated, and streamlined effort to connect regional buyers from institutions with local food produced on family farms. We anticipate that in the future, farms participating in a year-round program could increase sales by an average of \$10,400.00 gross income annually per farm business, representing a nearly 20% increase in annual gross profits for most small farms in the region, and in the process, increase consumption of locally grown foods. Our program also assists in eliminating on-farm waste while creating greater revenue streams for local farmers. Farmers participating in the pilot program made a profit. With their costs amortized over the year, the farmers were delighted to see a profit in the first year of the planning process. Farmers participating in the program sold their surplus goods that they could not sell at the market, therefore, participating was not an extra cost or additional investment for them. At markets, farmers typically grow in abundance and then sell what they can. This bulk food pilot program helped them sell their additional produce and products that did not sell at the weekly markets.

Our program is ready for an implementation phase. The Harvest website is developed and when launched will use the network that was created during the planning process to connect farmers directly to institutional buyers. Interested parties, both buyers and consumers, are already programmed in the database and ready to work together. We have the infrastructure established, buy-in from the local community, and have laid the foundation for an effective wholesale program.

During the planning stage, we have creatively problem-solved and resolved issues in our systems of operation. From our perspective, the pilot program has been successful and provided us with clear and cohesive information about how to move forward in an implementation phase of our program. We have developed a track record for buyers and sellers to review, and have created a robust list of long-term buyers of wholesale local food. We will continue to add to and update our sales records and our list of long-term buyers as our programming expands and others become familiar with our work. We have also adapted our marketing and outreach strategies to include boutique restaurants and we are testing methods of selling smaller orders, learning systems to provide avenues for these sales.

We seek to grow this program, moving ahead as we reach our annual goals and expanding our footprint in our community. We have and will continue to learn from other programs throughout the country by attending conferences and visiting other operations running successful wholesale programs. Learning from others who do similar work would address the educational needs of farmers and participating regional vendors to help increase profits for small and mid-sized family farms in Northeast Ohio while reducing on-farm waster.

Our broad wealth of connections built over 24 years of operating a successful farmers market system will help this project achieve its goals. For North Union, this was the natural "next step" to help farms sell their fresh local produce and foster relationships amongst growers, restaurateurs, chefs, corporations, and small grocers. Our ability to speak to both farmers and consumers helped us articulate the needs of both parties in a way that created win/win scenarios. Through this process, we have assisted growers who work to create high quality products as well as buyers who are knowledgeable about how the products they buy will be used. Work conducted during this planning phase was a strong investment in developing a program that is sustainable, a program that will be used by many members of our community, that promotes the use of locally sourced products, and significantly increases the income of small and medium farms.

Figure 1: Sample email copy to promote awareness of bulk food pilot program, summer 2018.

*Amazing meals start within your community and good food.
North Union Farmers Market is the source for fresh food!*

Good food starts where food originates. As you plan your next event menu, whether large or small, knowing it came fresh from a local farm, you're creating the very best. Now in our 24th year, North Union Farmers Market clearly understands that nothing tastes better than fresh and local.

Harvest, North Union's Bulk Food program, will work directly with you to access the freshest and most delicious ingredients for that perfect meal. We can make that happen for your next annual meeting, private dinner or large event. Imagine the buzz when people describe an amazing meal prepared with ingredients that save a family farm.

We currently work with artisan chefs in Cleveland who have committed to utilizing what northeast Ohio farms and vineyards have to offer, grassfed meats, grains, seasonal fruits, root vegetables, greens and so much more!

You have created a place of community and sustaining the health of your organization goes hand in hand with eating the best Ohio farms have to offer. Supporting local farms allows your values to be sown, create deep roots and flourish throughout Northeast Ohio. Nourishing bodies with local produce helps to keep the land healthy and productive as well as your community.

Join us in keeping your community and our farms healthy and alive!

Figure 2: Follow-up email copy

As summer heats up, local produce flourishes!

From sweet corn to local honey, our product list has greatly expanded in the past few weeks and will continue to grow. North Union is committed to connecting our local restaurants and community institutions with the region's finest produce, and we would be happy to provide you with this season's bounty. Space is limited in our pilot bulk produce program this summer so please reach out soon. Attached is our product list for the week.

Please also see **Attachment 1** (year-end summary to stakeholders) and **Attachment 2** (program brochure).