



**WESTERN
NEW YORK
REGIONAL
FOOD SYSTEM
INITIATIVE**



NOTE FROM THE AUTHORS

A NOTE FROM THE AUTHORS

A NOTE FROM THE AUTHORS

The completion of this report comes less than two months following the horrific massacre of ten African Americans by a white supremacist at a Tops grocery store in Buffalo's east side. Though we do not live in Buffalo, we visited the city, and that particular neighborhood, a number of times. We witnessed both the extreme poverty and disinvestment alongside vibrant urban farms, an emerging Black-owned food co-op, and other initiatives, led by people of color committed to overcoming the deep and long-term inequities that have kept this community from thriving.

In the words of Rebekah Williams, an active participant in this project and a co-founder and leader of the Buffalo Food Equity Network, "Intentional and systemic racism and historic disinvestment in Black communities has led to the circumstances of the tragic white supremacist terrorist attack that left ten people dead and three wounded at a neighborhood grocery store on Saturday. No one should lose their lives while shopping for food."

This report is dedicated to those leaders fighting for justice in Buffalo, as well as their farmer, business, and activist colleagues across the Western New York region who are building a more just and resilient food system every day.

**Anthony Flaccavento, John Fisk, Euneika Rogers-Sipp, and
Michael Shuman**

July 15, 2022

5	Executive Summary
11	Summary of Recommendations
21	Introduction
	Context & Background
	Project Methodology
	Short-Term Outcomes
36	Overall Findings
44	Access, Equity, & Sovereignty
	Findings
	Recommendations
65	Farmers & Producers
	Findings
	Recommendations
85	Markets, Infrastructure, & Supply Chain
	Findings
	Recommendations
117	Finance & Investment
	Findings
	Recommendations
133	Organizational Infrastructure Recommendations
146	Acknowledgements
150	Project Methodology
156	Appendices



EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The food system of Western New York demands understanding and targeted recommendations to make it more equitable.

To meet this challenge, a funders collaborative called Moving Forward Together (MFT) launched the **Western New York Regional Food System Initiative (WNYRFSI)** in January 2021. The project sought to improve the viability, resilience, and wealth-creating opportunities via a strong food system for communities throughout the nine-county region (Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Monroe, Niagara, Orleans, and Wyoming counties), in rural and urban communities alike.

This report is the culmination of the first 18 months of work—and, through its recommendations, lays a foundation for future action. As we move to that phase of action, our name will also evolve, becoming **Food Future Western New York (FFWNY)**.

Leading the work was SCALE, Inc., a four-person consulting team, who then engaged more than 70 regional food-system leaders in a Regional Advisory Council and five topic-specific Work Groups. Additionally, several dozen other food-system stakeholders

provided time and insights through interviews or in-person meetings. The findings and recommendations contained in this report reflect their diverse expertise and perspectives.

The report is divided into seven core sections: Introduction; Overall Findings; Access, Equity and Sovereignty; Farmers and Producers; Markets, Infrastructure, and Supply Chain; Finance and Investment; and Organizational Infrastructure. For more detailed information, please refer to the 14 appendices included at the end of the full report.



OUR KEY FINDINGS INCLUDE:

There are many strengths in the region’s food system.

The high-quality soils and abundant rainfall in WNY make it a “breadbasket” for people within and beyond its borders, producing a wide range of food and farm products. However, the system itself is under threat.

Growing inequities pose a key threat.

While many urban neighborhoods in Buffalo and Rochester lack access to healthy food, small farms and rural communities are simultaneously struggling to keep their businesses afloat. Both sets of communities struggle with long-term disinvestment and a wavering public commitment to address racial justice. (The mass shooting at the Tops Market—which was all the more painful because it occurred at one of the successful initiatives to reduce food inequality—happened in the last weeks of this phase of the project.)

Farms face critical concerns.

The increasing competition for scarce land from both residential and commercial developers, the weakening of some critical farm infrastructure, and the buying and consolidation of many farms and processors are top concerns. While regional farm sales have risen over the past few years, profitability remains largely elusive or nonexistent. Recent events, especially the rising costs of land, inputs, and labor, may drive many farms into bankruptcy.

OPPORTUNITIES FOR THE REGION INCLUDE:

Ongoing regional initiatives connect farmers with local purchasers, including three food hubs, three food e-commerce businesses, and at least seven mobile markets.

A significant regional commitment to increased local purchasing from educational and health anchor institutions, which in turn creates the potential for a significant expansion in both markets for farmers and the availability of healthy foods for tens of thousands of people in the region.

Vastly more investment capital can be injected into food and farming businesses and projects by mobilizing grassroots investors. Through investment crowdfunding, regional investment funds, and other tools, a new marketplace can be created that connects local investors with exciting new businesses.

It is worth saying that this project was designed to produce not just a report, but action. We encourage those in the region interested in strong food systems to read the summary of the 32 project recommendations on the next pages, as well as the detailed elaboration of these recommendations available in the full report, intended to give a wide range of actors—farmers, business people, consumers, activists, investors, funders, and policymakers—guidance and inspiration for next steps.





SUMMARY OF RECOMMENDATIONS

SUMMARY OF RECOMMENDATIONS

Our recommendations span all dimensions of this project. For greater detail, please view the **Recommendations** sections of the full report.

*A note on organization names: the Western New York Regional Food System Initiative (WNYRFSI) was created for the first phase of our project: generating this report. Moving forward into the next phases, the initiative will be known as **Food Future WNY (FFWNY)**. Our recommendations reference the latter name.*

ACCESS, EQUITY, AND SOVEREIGNTY

- ① **Establish a Food and Racial Equity Council** to develop a set of decision-making criteria and/or guidelines across the Western New York region to ensure that racial equity is a priority in the decision-making process for FFWNY and new and existing investments.
- ② **Dedicate a stream of funds that will direct capacity-building investments toward initiatives that prioritize Black, Indigenous, and People of Color (BIPOC) food system actors** by investing in new and existing projects in urban, peri-urban, and rural geographies that are majority BIPOC and BIPOC-led.
- ③ **Invest in the formation of a food sovereignty capacity-building partnership** that can provide agricultural technical assistance and demonstration sites of self-sufficiency across the WNY region.
- ④ **Identify ways to increase control of and ownership of land for low-wealth communities and individuals**, whether through individual or shared ownership.
- ⑤ **Mobilize local and regional planning** to effectively shape local community-led response, decision-making, and policy outcomes to critical food distribution and supply challenges.

- ⑥ **Make a significant investment in a wealth creation value chain approach** in poor rural and urban areas through supporting community-driven health and positive nutrition education, food and health marketing, and physical activity habits to address chronic illnesses in Healthy Food Priority Areas (HFPAs).
- ⑦ **Address the digital divide by creating a multilingual social network communications** and an information hub by engaging multiple modes of delivering information.



FARMERS AND FOOD PRODUCERS

- ① **Increase the viability of WNY farmers**, particularly newer, limited resource, or BIPOC farms, through systematic efforts to:
 - Increase demand for local foods
 - Improve access to well-paying markets
- ② **Increase access to quality, affordable farmland** with particular focus on new farmers, BIPOC farmers, and urban growers.
- ③ **Help cultivate and support the next generation of farmers** through investment in farm and food apprenticeships, farmer networks, and programs to link new and aspiring farmers with retiring farmers.
- ④ **Dedicate a stream of funds for investment in critical on-farm infrastructure**, particularly for newer, limited resource, and BIPOC farmers.



THE REGION'S SUPPLY CHAINS, INCLUDING MARKETS AND INFRASTRUCTURE

For Markets and Buyers

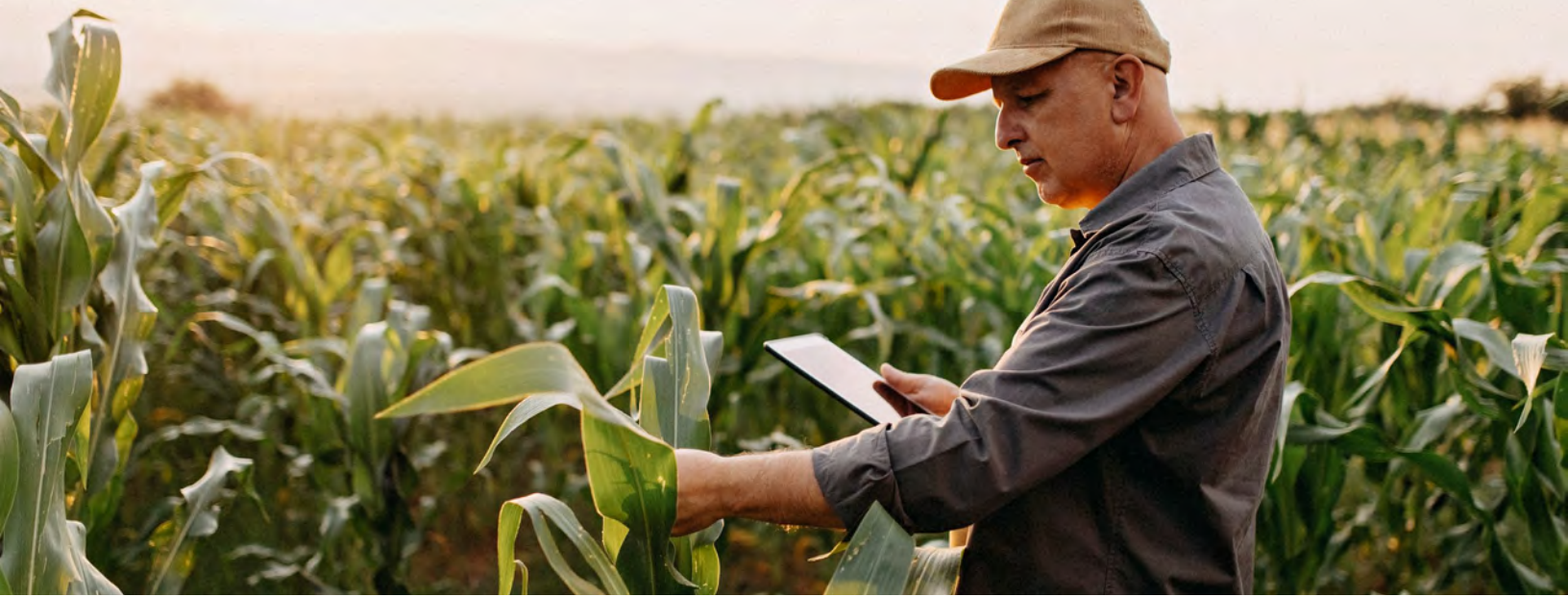
- 1 **Significantly increase values-based procurement**, including local and regional and equitable food purchasing, by anchor institutions including universities, hospitals, and public schools.
- 2 **Identify local, regional, and state level policies that hamper values-based procurement by institutions** and the policies that would enhance values-based food procurement. Leadership of FFWNY should work in partnership with regional and state level organizations to secure the needed policy changes.
- 3 **Increase community food sovereignty and equitable access to fresh and healthy locally produced foods through alternative retail options**, such as cooperatives, farm stops, e-commerce, and other models.
- 4 **Help local and regional emergency food distributors shift to a greater emphasis on local capacity-building and food sovereignty** versus only emergency food distribution.



Infrastructure

- ① **Expand meat processing capacity throughout Western New York** through strategic investments in local, farmer-driven models.
- ② **Increase market access for small to midsize farmers, and increase consumer access to local food** by pilot testing a network of "sub-hubs" that link producers with food hubs, food distributors, e-commerce platforms and end buyers.
- ③ **Increase access to commercial kitchen processing opportunities for aspiring food entrepreneurs and for groups focused on food sovereignty** by partnering with and expanding the capacity of existing commercial and shared-use kitchens.
- ④ **Expand processing and value adding options for dairy farmers,** potentially including through investment in small processing facilities – micro-dairies or creameries – that add value and enable direct sales of local milk.
- ⑤ **Work with existing BIPOC-owned businesses and BIPOC-run organizations to identify and implement opportunities for investment** that both supports their enterprises and, more specifically, builds opportunities for expanded BIPOC ownership within the WNY food system.





FINANCE AND INVESTMENT

- ① **Create an online regional repository resource available to help food and farming businesses (FFBs) access capital.** This will be especially helpful for women and BIPOC entrepreneurs who have historically been excluded from the traditional entrepreneurship ecosystem. This repository can build off the work the Food Finance Work Group has done on the Food Future WNY website.
- ② **Create a new regional fund that invests in FFBs.** Because funds provide investors with diversification, liquidity, and professional management, an FFB fund can serve as a more attractive way for residents to invest in FFBs. It also can increase the ability of women and BIPOC entrepreneurs to find needed capital for their FFBs.
- ③ **Expand the local investment marketplace in the region for FFBs** to promote local economy-building and to make the economy more inclusive of BIPOC businesses and investors. This means putting effort into preparing, both more FFBs to be “investment ready,” and more investors to be ready for local investment opportunities.
- ④ **Mobilize policymakers in the region (state, county, and local)** to embrace simple, low-cost ideas for accelerating the flow of local capital to FFBs.

ORGANIZATIONAL INFRASTRUCTURE TO GUIDE AND MANAGE FOOD FUTURE WESTERN NEW YORK

- ① **Continue to embrace, develop, and use the operating principles** developed by the Regional Advisory Council (RAC) and applied across the initiative.
- ② **Continue the Regional Advisory Council (to be renamed the Regional Council)** as a core structure and means for stakeholders to meaningfully lead FFWNY as it works to use and implement the phase 1 findings and recommendations.
- ③ **Establish food and racial equity as an integral part of FFWNY** that advances the initiative's collective understanding and work on food and racial equity.



- ④ **Revise and empower the Work Groups** with resources that support the development and implementation of focused work plans with realistic goals.
- ⑤ **Develop a shared governance approach for FFWNY** that supports efficient management of the initiative and implementation of concrete actions that reflect the diverse range of perspectives and needs.
- ⑥ **Clarify the initiative's branding** and be proactive in internal and external communications.
- ⑦ **Expand the initiative's capacity and staffing.**
- ⑧ **Build awareness of and the capacity to inform local and state policy** processes in support of a more resilient and equitable food system.



A photograph of a person wearing black gloves, handling a can of Campbell's soup in a food bank setting. The person is wearing a black t-shirt and is standing behind a table covered with various food items, including bags of rice and boxes of cereal. The background is filled with more food supplies. The entire image has a strong orange-red color overlay. The text 'INTRODUCTION' is centered in white, bold, uppercase letters. On the right side, the text 'CONTEXT AND BACKGROUND' is written vertically in white, uppercase letters. The page number '21' is located in the bottom right corner.

INTRODUCTION

CONTEXT AND BACKGROUND

CONTEXT AND BACKGROUND

In March 2020, when the pandemic reached Western New York, the philanthropic community mobilized quickly, creating the WNY COVID-19 Community Response fund to support nonprofits serving on the frontlines of helping our community meet the emergency needs of its residents. In June 2020, the WNY COVID-19 Community Response Fund expanded its response to the pandemic and looked toward recovery by inviting stakeholders to strengthen key systems through new solutions. This initiative, named "Moving Forward Together," issued a call to our community to share their best ideas to address long-standing issues through collaborative solutions.



The Western New York Regional Food System Initiative (WNYRFSI) launched in January of 2021, supported by Moving Forward Together, to gain a better understanding of the food system of Western New York (WNY) and develop recommendations to foster a more robust and equitable regional food system. A robust regional food system improves resilience and food security in an ever-changing world and offers jobs

and wealth creation opportunities for rural and urban communities. Working cross-sector and across the nine counties of WNY, the objective of WNYFCSI has been to address the entrenched and chronic conditions that have perpetuated long-term food insecurity, undermined the viability of small to mid-size farms, and reduced opportunities in the regional food economy.

WNYRFSI was co-led by the WNY Foundation and the Southern Tier West Development Foundation (STWDF) who spearheaded the development of the project prospectus and supported programmatic and priority focus determinations throughout. Additionally, STWDF was the fiscal sponsor providing financial management, program support and actively participated in the Regional Advisory Council and the Work Groups. STWDF is a nonprofit affiliate of the Southern Tier West (STW) Regional Planning and Development Board, which is a unit of special purpose government that provides regional planning and development coordination for Allegany, Cattaraugus, and Chautauqua Counties.

As the designated local development district for the Appalachian Regional Commission (ARC), STW works regionally to bring parity in opportunities for residents of the NYS portion of Appalachia by leveraging existing assets for economic betterment. In 2012, ARC updated its strategic vision for Appalachia to include assessing, leveraging, and advancing local and regional food systems to help advance economic growth opportunities while localizing access to farm and food products. STW sponsors several affiliate organizations (each with an autonomous organizational identity) and avails its staff capacities to the various affiliates while providing an umbrella of fiscal management, reporting, compliance, and high-level administrative oversight. The New York Sustainable Agriculture Working Group (NYSAWG) became a 501(c)3 affiliate of Southern Tier West in 2018. NYSAWG's mission is to create a strong food system and promote sustainable land and agricultural use through education, applied practices, programming, and shared resources.

SCALE, Inc., based in Abingdon, Virginia, was selected as the consultant to lead this effort. SCALE founder and president, Anthony Flaccavento, was joined in this project by three nationally acclaimed experts in the field, including John Fisk, Euneika Rogers-Sipp, and Michael Shuman.



“THE FOOD FUTURE WNY PROJECT HAS HELPED EVERYONE TO TAKE A LOOK AT THE VARIOUS ASPECTS OF THE FOOD AND AGRICULTURE SYSTEM IN WNY MORE REGIONALLY. WITH THE REGION BEING PART OF TWO NYS ECONOMIC DEVELOPMENT REGIONS, AND THE CULTURAL DIFFERENCES BETWEEN THE NORTHERN TIER AND SOUTHERN TIER AREAS OF THE REGION, IT IS CRITICAL THAT PARTICIPANTS CONTINUE TO LOOK AT FOOD AND AGRICULTURE FROM A REGIONAL PERSPECTIVE AND DESIGN ACTION STEPS TO KEEP THAT FOCUS IN PLACE.”

– **JOAN SINCLAIR PETZEN**, SINCLAIR FARM, RETIRED CCE STAFF

Over the past 18 months, the SCALE team led and facilitated a far-reaching process to assess the strengths and weaknesses of the region's food system, formulate recommendations that are both implementable and transformative, and help build the capacity of critical food system groups, businesses, and actors along the way. To do this, SCALE created a highly participatory, "bottom up" approach with extraordinary levels of involvement from a diverse array of food system stakeholders from across the nine-county region.

The full process is described in detail in the Project Methodology section (found on page 149).

IN SUMMARY, THE PROCESS INVOLVED:

Creation of the Regional Advisory Council, which included 21 food system stakeholders from across the region, representing a diverse array of communities, organizations, businesses, and interests. The RAC met monthly from April 2021 through to the final month of the project in June 2022. The RAC assisted the consultant team in multiple ways, including:

- Sharing insights, comments, and feedback on many project elements, documents, and ideas that emerged
- Providing leads and opening doors to scores of other food system stakeholders whom the SCALE team subsequently engaged in various ways
- Helping plan the consultants' three site visits, as well as helping to organize and host specific site visit gatherings
- Ensuring that the commitment to JEDI (Justice, Equity, Diversity and Inclusion) principles and practices remained central to the initiative throughout

Creation of “Work Groups” as a means of diving more deeply into specific food system issues or constituencies. The Work Groups met at least monthly, with some of them meeting every two weeks, beginning in the late summer of 2021 and continuing through the end of the project. They proved essential to the project, both in terms of deepening the consultants’ knowledge and understanding, and in moving forward with specific, concrete food and farming projects. The focus of the five Work Groups, determined in consultation with RAC members, included:

- Farmers and food producers
- Access, equity, and sovereignty
- Markets and buyers
- Finance and investment
- Infrastructure

From the outset, this project has been driven by a commitment to building a food system with far greater levels of equity, diversity, and resilience than is reflected in the current system. The consultation process itself was guided by the following principles:

- ① Establish JEDI (Justice, Equity, Diversity, and Inclusion) principles
- ② Focus on systemic change rather than "band aids"
- ③ Work towards concrete action
- ④ Identify the data you need and use data to inform your plans
- ⑤ Identify necessary policy changes
- ⑥ Promote economic development and economic sovereignty





INTRODUCTION

QUANTITATIVE SKILLS

SHORT-TERM OUTCOMES

Most food system assessments include information gathering, analysis, and recommendations for future implementation, but operate outside the realm of concrete action during the life of the consultancy. WNYRFSI was different in that fostering this concrete action was an inherent part of the process.

It was also unique in a number of other respects, including a project start-up that put structures in place to continue the work beyond this contract. These structures are primarily the RAC and Work Groups, though other opportunities emerged as well. While most action resulting from this process will emerge from recommendations in the second phase of the project, a number of specific products or outcomes were achieved over the project period as a result of collaboration between the SCALE team, the Work Groups, and other local food system actors.

SOME OF THESE OUTCOMES INCLUDE:

A Funding Guidance document that provides both specific criteria for evaluating potential projects and an outline of a process for considering and reviewing projects for funding. Developed by the SCALE team and its local partners, the Funding Guidance document provides funders with a means to consider and prioritize projects now and into the future.

Two public policy workshops, one focused on municipal and local policy considerations and the other looking at how to more effectively impact state-level policy related to farm and food system issues. The consultants organized and promoted the two sessions, which were implemented by Nathaniel Mich of the UB Food Lab and Cathy Young of the Center for Excellence in Agriculture, respectively.

A funding framework to help food and farming businesses and projects get capital. Specifically, the project website now lists relevant companies in the region seeking capital on investment crowdfunding sites, pre-purchasing sites, or donation crowdfunding sites. Additionally, extensive resources were put in place to help guide WNY companies seeking grassroots investment and WNY investors interested in supporting these companies. Three companies have already listed their offerings on the site, and as a result of a trip by SCALE's Michael Shuman to the region to introduce these resources, more than a dozen other companies are now considering using this option.



Assistance to Alliance Farm Butchery (a model business) to refine their business plan and bring it to regional funders for consideration.

The SCALE team worked with the proprietors throughout this process to bring attention and resources to their innovative strategy for addressing the critical gap in meat processing.

An aggregation sub-hub by Brigiotta's Produce in Jamestown (emerged in large part through the participation of the Infrastructure Work Group). This pilot effort will help test the value and efficacy of sub-hubs as a means to broaden market access for small farmers and food access for consumers.

Three educational and engagement events with regional anchor institutions and suppliers to advance values-based food procurement.

The first was in partnership with **CCE Harvest NY** and focused on universities and colleges where we identified key challenges, needs, and approaches that are working. The second was broadly focused on hospitals, public schools, and universities and was in partnership with the **Buffalo Niagara Medical Center**. The third was focused on procurement and food service staff at institutions and large businesses supported by the **Buffalo Purchasing Initiative, WNYRFSI, Good Food Buffalo Coalition, BNMC, and CCE Harvest NY**.

Creation of a Food and Racial Equity Council to ensure a Racial Equity Process is embedded throughout the initiative, moving beyond the promotion of Justice, Equity, Diversity, and Inclusion (JEDI) principles reflected in the Access, Equity, and Sovereignty Work Group. This happened as a result of several BIPOC-only RAC meetings.

Creation of a resource and information list on Community-Based Food Resiliency Networks, Justice-Based Strategies, and an associated learning series: “Prioritizing BIPOC-Led Food System Actors to better respond to community food needs and food supply challenges.” There were two presentations from national experts, but the majority of the sessions were developed in partnership with **Food for the Spirit’s** Buffalo Food Equity Network (BFEN).



A Wealth Creation Value Chain Framework that summarizes the results of a participatory research and engagement process with regional stakeholders and Work Group members. This value chain builds on existing infrastructure and programs in the region and provides a framework for potential anchor collaboration partnerships to aid in equitable investments in disinvested and marginalized communities, as well as a values filter developed in partnership with Cooperation Buffalo.

Plans for a regional Food Sovereignty Capacity Building Partnership. The development of Healthy Food Priority Areas (HFPAs) that are part of a community-led mapping process in partnership with UB Food Lab to address and understand root causes of food disparity in areas with high concentrations of vulnerable households.



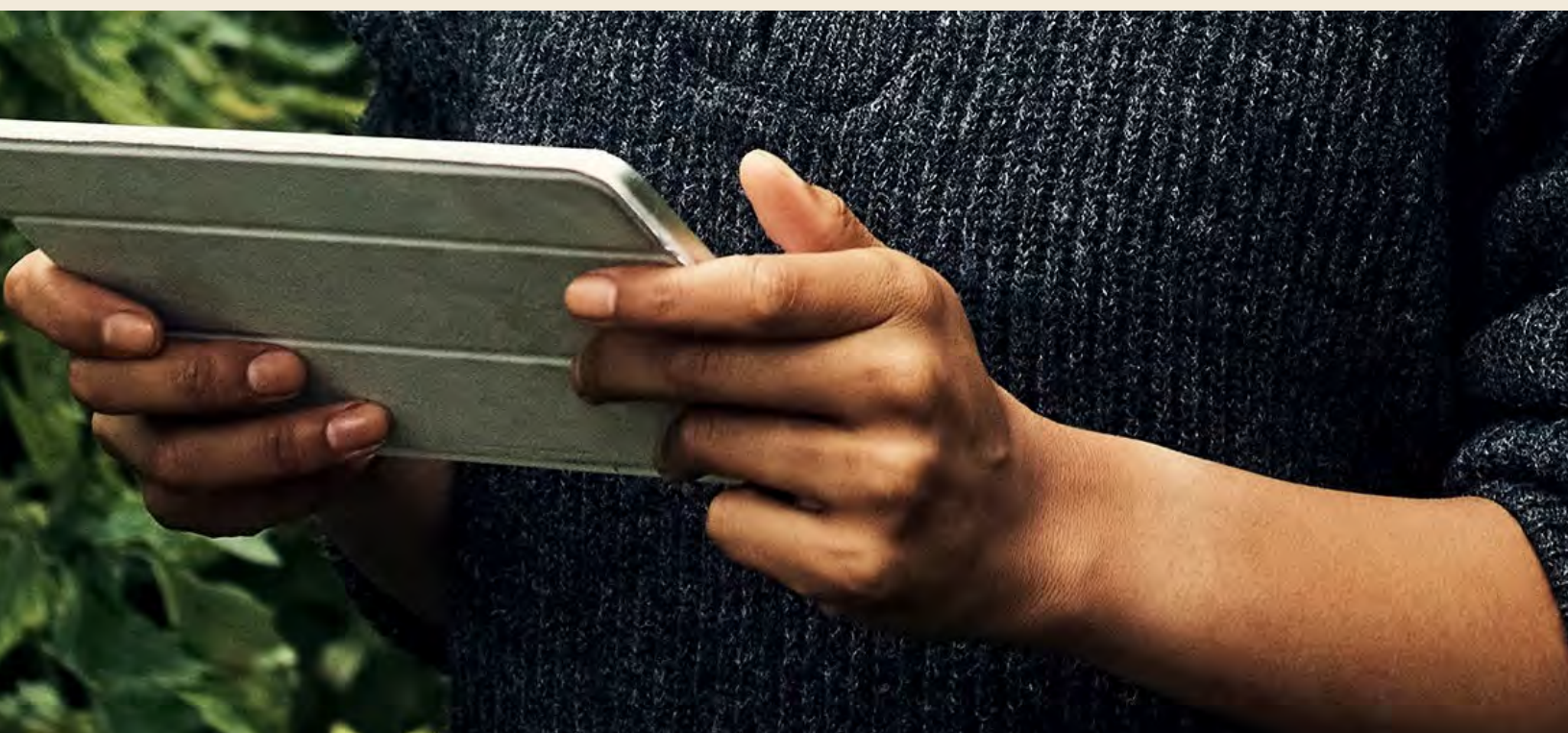
FINDINGS

The five sources of information described in the “Methodology” section, integrated with the experience and knowledge the consultants bring to the project, provide the basis for the findings in this report. One of the appendices includes the detailed findings from the quantitative surveys, portions of which are included in this section. We have chosen to include those we believe to be most pertinent, rather than sharing every finding accumulated along the way.

We have grouped the findings into five categories:

- Overall Findings
- Access, Equity, and Sovereignty
- Farmers and Producers
- Markets, Infrastructure, and Supply Chains
- Finance and Investment

Note: In most cases, information obtained from one source of information, such as the quantitative surveys, was corroborated by other sources of information, such as stakeholder interviews and/or in-depth discussions within relevant Work Groups.





RECOMMENDATIONS

The recommendations in this report were developed with extensive consultation and input from each of the five Work Groups. The recommendations in each section include a mix of both immediately actionable items and longer-term recommendations, some of which include the need for further research, exploration, and development. We believe this is in keeping with the initiative's goals to foster concrete action while also working towards systemic change. We are confident that the relationships and capacity built during this first phase of the project, particularly within the RAC and the Work Groups, will enable WNYRFSI to utilize and adapt these recommendations to their particular communities and circumstances.

Appendix F includes some of those immediately actionable steps, excerpted from each of the longer sets of recommendations.

The background of the page is a dense, close-up photograph of numerous white eggs. The eggs are arranged in a somewhat regular pattern, filling the entire frame. The lighting is soft and even, highlighting the smooth texture of the eggshells. The overall color palette is a range of off-white and light beige tones.

OVERALL FINDINGS

OVERALL FINDINGS

OVERALL FINDINGS

A number of findings emerged during this investigation that cut across different food system elements and generally hold true for all or much of the region. These also relate to the specific findings by category that follow and should be understood as part of the broader context of the total recommendations.

- ① **The region is rich in agricultural resources, which are a significant part of the region's economy.** However, globalization has driven consolidation and specialization in the food and agricultural sectors, reflected in the region's dairy, livestock, fruits, and vegetables. As a result, there are fewer but larger farms, processors, and retail/food service companies. This consolidation limits opportunity for small and mid-size businesses and entrepreneurs, both urban and rural. Ensuring a strong representation of rural, urban, Black, Indigenous, People of Color (BIPOC) farmers, businesses, and advocates for justice and equity was a common priority among interviewees.
- ② **It is impossible to accurately characterize "farms" or "farmers" in the region because of the extraordinarily wide range of types, geography, scale of production, and associated assets, needs, and challenges.** Unlike other agriculturally rich areas, where a small number of commodity crops predominate and the scale of farms is almost universally large, the WNY region is characterized by both farm and farmer diversity. This is an asset, both economically and in terms of the potential for a more self-sufficient and resilient regional food system, but it also presents significant challenges because it demands multiple approaches to forge solutions.





- 3 Unfortunately, racism and other inequities have a far-reaching impact on the WNY region and its food system.** From the start of this initiative, there has been an effort to address the impact of racism. At its core, it is foundational to understanding structural inequities in every aspect of the food system in order to ensure accountability to the principles of justice, equity, diversity, and inclusion. Food system initiatives that lead with equity and justice-based strategies and those that do not are both part of the landscape in the Western New York region, sometimes creating points of division rather than bridging differences for transformational change. Evidence of these inequities, rooted in the long history of stolen land, racism, and disinvestment, manifest in many ways, from lower wage job opportunities to a lack of diversity on corporate and institutional boards.
- 4 For the most part, food system actors and stakeholders were not acting in concert, actively collaborating, or regularly communicating prior to the launch of the WNY Regional Food System Initiative.** There were exceptions, but this lack of collaboration was clearly the norm. It was in part geographical, with different areas of the nine-county region lacking connections or plans for joint action. It was also mostly absent within specific food system sectors or constituencies, for example among farmers or between food hubs and locally based distributors whose territories and markets overlapped.

The established collaborations we did find were primarily market driven, including the **Eden Valley Growers, Headwater Food Hub, Upstate Niagara Cooperative, United Apple Sales, the Southern Tier West Farmers Market Association, the Greater Buffalo Urban Growers (GBUG) network,** and a handful of others. Access to markets appears to be a strong impetus for collaboration, though not the sole driver. Additionally, the **Buffalo and Erie County Food Policy Council** and the **Chautauqua County Food Policy Council** have been working for some time to promote collaboration and a more holistic approach to the food system.

- ⑤ **However, there was clear hunger for meaningful collaboration expressed and acted upon by the majority of participants in the project.** Repeatedly, members of the RAC, Work Group participants, and other stakeholders expressed that the collaboration initiated during this project was long overdue and essential to building a better food system.
- ⑥ **Maintaining this collaboration, let alone expanding and intensifying it, will require tangible progress on key objectives and investment in concrete outcomes.** Participants have made clear that future engagement, about which they are excited, will require moving beyond discussions into action, and this in turn will necessitate investment and some level of staffing support.

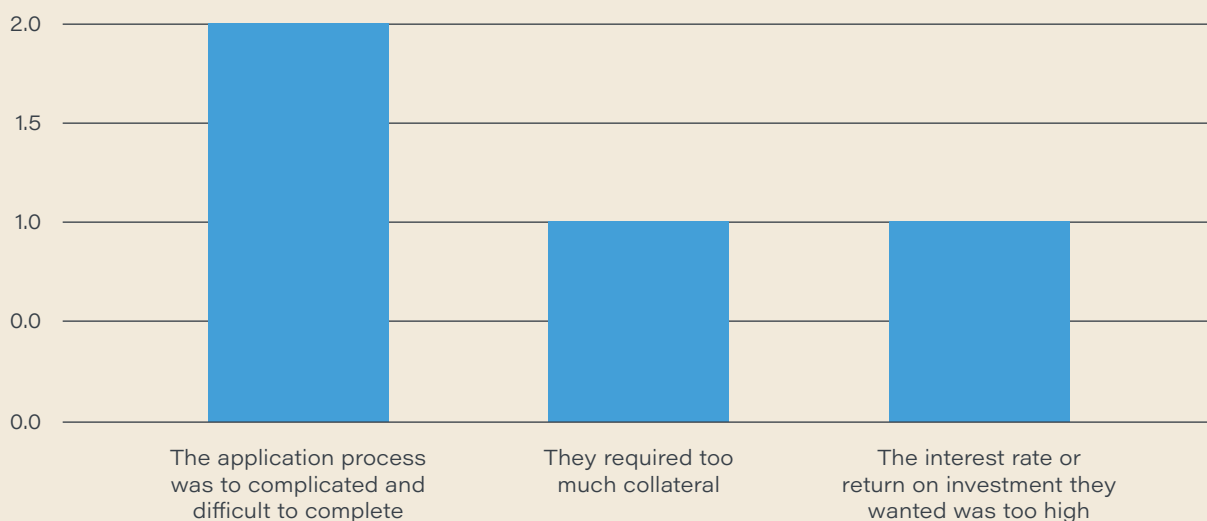




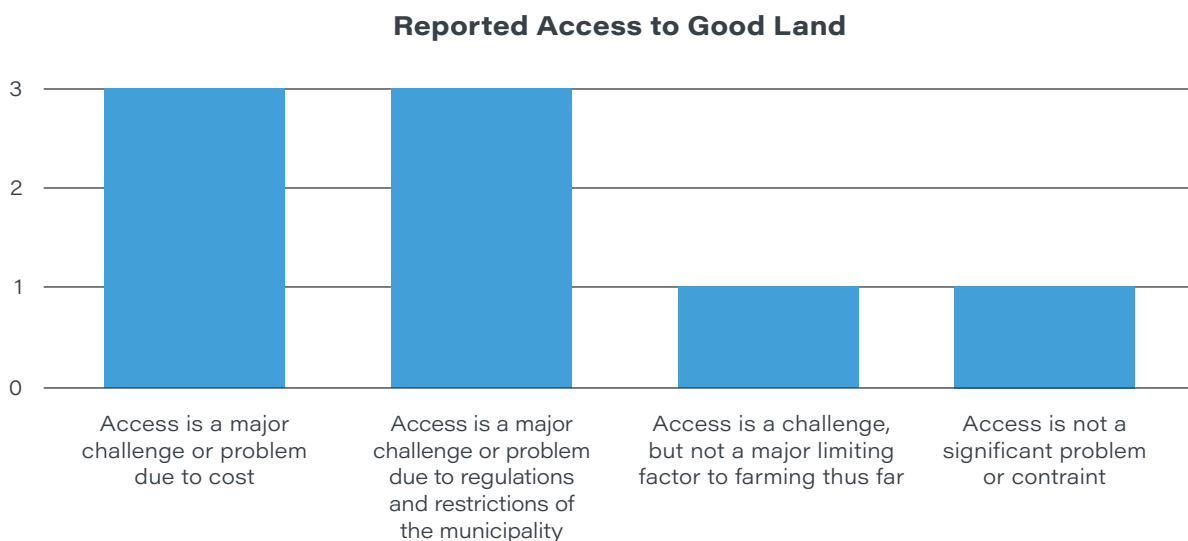
7 Most community-based organizations and small to midsize farmers and food entrepreneurs lack the time or capacity to pursue and secure the capital they need to reach a viable scale of operations.

This is also true, to a somewhat lesser degree, of training and technical assistance needs which can either be challenging to access (or know where and how to access), or might not fit the needs of these groups, farms, or businesses. A common refrain is that application and proposal requirements (whether from the USDA or regional foundations) are too complex and time consuming for under-resourced groups and businesses to meet the requirements. This was corroborated by the survey of aspiring farm and food entrepreneurs, three-fourths of whom have not pursued financial assistance to completion, either because applications were too complicated or difficult, or because too much collateral was required.

Reported Reasons for Unable to Obtain Financial Assistance



8 **There is widespread regional interest, but no central organization or initiative, in changing public policy to enable and support a more equitable, resilient, and profitable food system.** This interest spans local (county, municipal), state, and federal policies, as well as the institutions charged with implementing the rules and regulations derived from laws. Several individuals involved in the project are very knowledgeable advocates for improved food system policies, ranging from members of Greater Buffalo Urban Growers (GBUG) network to the Cornell Cooperative Extension staff focused on livestock and meat issues. While no clear mechanism emerged to pursue public policy on a regional basis, there is appetite and need to do so.



9 **Access to good quality, affordable land is increasingly difficult in many parts of the region, especially for BIPOC, urban, and newer farmers.** In urban settings like Buffalo and Rochester, two issues appear to predominate in making land inaccessible or unaffordable: The influence of large-scale commercial developers on local officials who are reluctant to allow urban farming (or even gardening) and who prioritize commercial development of vacant lots over farming and food production; and the challenges of soil contamination and access to water for irrigation, common to many abandoned urban lots.

“IT IS INCREDIBLY HELPFUL FOR INDIVIDUALS AND ORGANIZATIONS INVOLVED IN FOOD SYSTEM CHANGE TO HAVE THE CHANCE TO STEP BACK AND, IN AN ORGANIZED WAY, WORK TO UNDERSTAND THE NEEDS AND OPPORTUNITIES ACROSS A LARGER COLLABORATIVE AND INCLUSIVE NETWORK. CHANGEMAKING MUST INCLUDE BOOTS ON THE GROUND MARCHING FORWARD, BUT THERE ALSO NEEDS TO BE LISTENING, SHARING, STRATEGIZING, AND PLANNING... TOGETHER. THIS INITIATIVE HAS BEEN A GREAT EXAMPLE OF HOW TO DO THAT WELL, CATALYZING MANY NEW CONNECTIONS, CONVERSATIONS, AND COLLECTIVE PLANNING PROCESSES. AS A FOOD HUB OPERATING IN WNY, WE ARE PROUD TO HAVE BEEN PART OF SUCH AN ACTIVE AND ENGAGED GROUP. THIS HAS BEEN A MEANINGFUL STEP FORWARD FOR WNY, AND WE LOOK FORWARD TO THE ONGOING GOOD WORK AHEAD!”

– **CHRIS HARTMAN**, PRESIDENT/CEO OF HEADWATER FOOD HUB



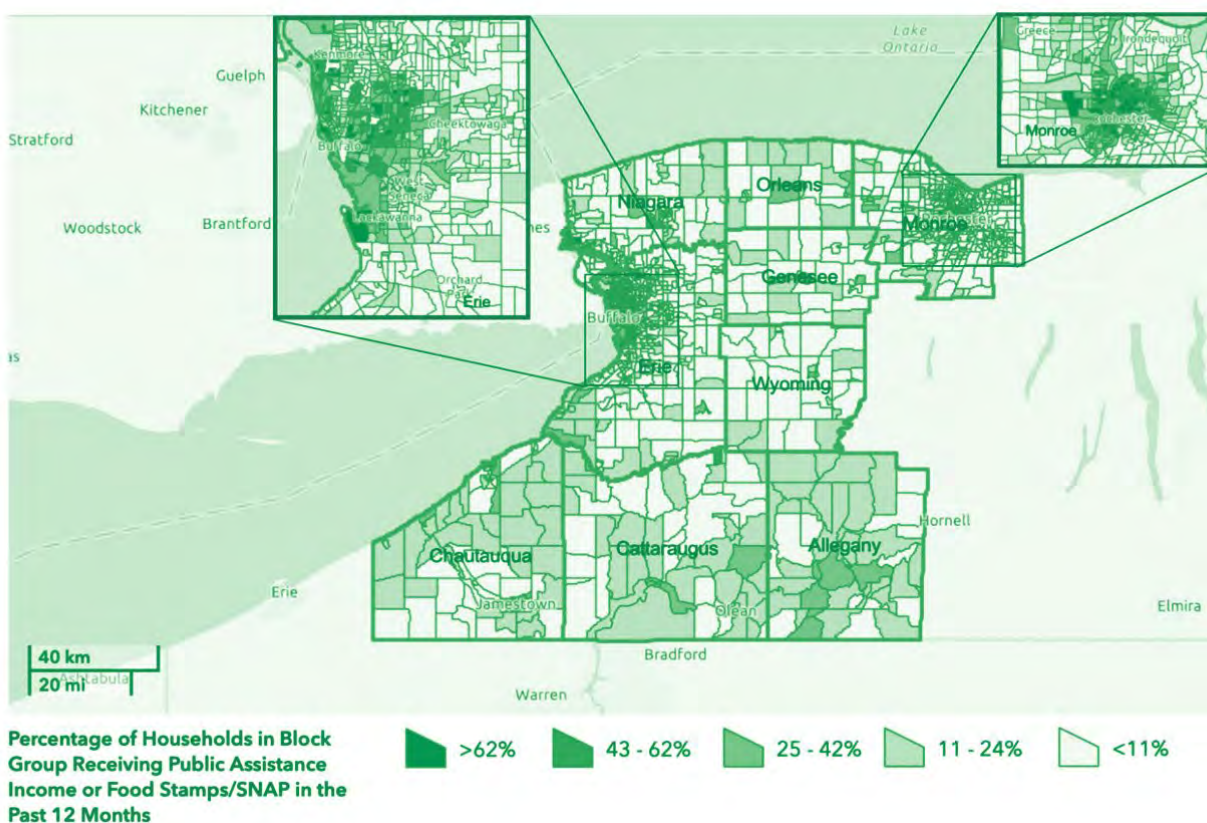
**ACCESS, EQUITY,
AND SOVEREIGNTY**

FINDINGS

FINDINGS

Various factors have shaped Western New York's current food system with regards to food availability, access, and stability. Over the past decade, programs such as the Special Supplemental Nutrition Assistance Program (SNAP), the Supplemental Nutrition Assistance Program for Women, Infants, and Children (known as WIC), the Farmers' Market Nutrition Programs (FMNPs), and larger regional food banks have steadily increased and dominated the landscape.

These programs provide food, primary resources, and assistance to reduce food insecurity. However, we found that these approaches do not exclusively ensure the conditions required by a sustainable food system planning process. Additionally, many programs do not have the capacity to fully address solutions for meeting the multitude of challenges faced by a community's food system. This is especially true for communities that have been historically marginalized. [See Appendix L]



The nine-county region of Western New York showing the percentage of households receiving public assistance or food stamps/SNAP. The history of redlining, racial segregation, and ongoing economic development drive inequity and leaves communities of color concentrated in areas correlated to increased risks. Zoomed-in areas are showing Erie and Monroe counties. Map courtesy of Information Drives WNY Region Food System Initiative.

Using a collaborative, community-based methodology, the Access, Equity, and Sovereignty Work Group held bi-weekly gatherings to research the nine-county, Western New York region from July 9, 2021, to June 21, 2022. One of our goals was to amplify the work of community-based organizations serving urban, peri-urban, and rural areas through their network of community food systems. The most prevalent finding was that there is not a good contextual understanding of how long-standing structural challenges (revealed and intensified by the pandemic) are currently being exacerbated by multiple crises in the global food supply chain. These structural challenges and crises impact current neighborhood characteristics and minority presence, as well as lead to a higher prevalence of poverty and more significant household vulnerabilities [see Appendix L].

The findings below present key learnings, operational scenarios, resources, and a guide to success in the management of food systems. Included as well, is information on local food networks, cross-sector partnerships, and infrastructure to implement an equitable approach [see Appendix L]. While some of our findings are specific to Erie County and East Buffalo, much of the data can be applied to additional community food system infrastructure within the WNY region and beyond, especially in locations where there is a higher concentration of equity and justice-based food system leadership.





SPECIFIC FINDINGS:

- 1 **Most food system actors we interviewed agree that the emergency food planning process has not made the best use of their knowledge** to directly confront the causal conditions of food disparities, and has left key food system actors out of the loop [see Appendix L]. In May 2022, East Buffalo's only grocery store shut down due to a mass shooting of 10 Black residents. The Black Buffalo community stepped in to lead a few smaller efforts, and remaining businesses took on a more significant role, both in providing food and also in deciding how the food sector should invest.
- 2 **Emergency and charity-based food system models (such as pandemic-related responses and the Tops mass shooting) have left valuable community-based food system assets untouched or underdeveloped.** For residents in neighborhoods experiencing faster recoveries, it is essential to understand that other communities are not doing well and that additional support is necessary as soon as possible. For residents not recovering as quickly, their needs must be made evident and communicated to others. Many food system initiatives do not have the level of community voice, support, and participation needed for sustainable long-term results [see Appendix L].

“THE PRECARIETY OF ACCESS TO HEALTHY AND CULTURALLY APPROPRIATE FOOD FOR OUR COMMUNITIES HAS TAKEN CENTER STAGE AND IT MUST NOT—EVER—TAKE A BACKSEAT AGAIN. IT MUST BE PART OF AN INTERSECTIONAL ANALYSIS AND AGENDA IN THE CREATION OF COMMUNITY-CONTROLLED AND SELF-SUFFICIENT NEIGHBORHOODS, WITH THOSE CLOSEST TO THE CHALLENGES WE’RE FACING OFFERING THE BOLDEST IDEAS IN A CO-GOVERNING RELATIONSHIP WITH THOSE IN POWER. EQUITY, DIVERSITY, INCLUSION, AND MOST IMPORTANTLY, JUSTICE DEPEND ON IT.”

– **HARPER BISHOP**, ACCESS, EQUITY, AND FOOD SOVEREIGNTY
WORK GROUP MEMBER, PROVIDENCE FARM COLLECTIVE

③ **Diverse opportunities exist across Western New York to surpass pre-disaster levels of community well-being through increased equity and diverse opportunities.** However, most of these opportunities are missed due to a telescopically narrow lens, the devaluing of these offerings, and the marginalization of communities that are constantly grappling with a structurally racist past and present. These factors impede the creation of viably equitable, sovereign food systems. Inequities and inequalities are prominent in racial and ethnic communities due to a lengthy history of structural and systemic racism, which has resulted in relegation, oppressive practices, and policies that still exist in the built environment [see Appendix L].



④ **There are significant initiatives promoting community building, local ownership, and stewardship of the land.** Several participants were involved in local and regional initiatives with creative ownership structures. Examples include:

- a. Blegacy Farms and the African Heritage Food Coop - Improves local ownership of farmland and grocery store enterprise as an anchor to the historic Fruitbelt neighborhood.
- b. Farmer Pirates Compost - Cooperatively owned soil and compost service.
- c. Cooperation Buffalo - Helps structure cooperatively owned enterprises and seed commons framework [see Appendix L].
- d. Grassroots Gardens WNY - Formed to hold title to land in perpetuity, allowing the community to provide permanently affordable and accessible land use to meet community food needs.
- e. Gakwi:yo:h Farms - The Tribal ownership of Gakwi:yo:h food enterprises held collectively by the Seneca Nation.
- f. Taproot Collective - Creates community covenants and easements so the community can hold development rights to green spaces and gardens in Rochester and surrounding areas.
- g. Providence Farm Collective - Supports under-resourced farmers in Western New York who require access to fertile rural farmland, farming, business education, technical assistance, access to markets, and the opportunity to farm for income.
- h. Rochester Area Community Foundation and the Genesee Land Trust – Develop community endowments and align investor expectations while ensuring the social mission remains intact through time.

“COMMUNITY-BASED FOOD DISTRIBUTION PROGRAMS WILL NEED TO INVEST IN PRE-EXISTING AND HEALTHIER FOOD PANTRIES THAT INCLUDE CULTURALLY APPROPRIATE FOODS WHILE PARTNERING WITH FOOD DISTRIBUTION EFFORTS INCLUDING THOSE LED BY PUBLIC LIBRARIES, COMMUNITY HEALTH CENTERS, AND LOCAL CHURCHES...”

– **RITA HUBBARD-ROBINSON**, FIRST FRUIT FOOD PANTRY AT LINCOLN MEMORIAL CHURCH, BUFFALO

5 **There has been an increase in mutual aid networks where residents trade among themselves due to COVID-19.** This represents an opportunity to create livelihoods. Yet, there needs to be increased collaboration and knowledge sharing among food system actors along the value chain. A more defined network of strategy and coordination, practice, action, shared risks, and policy can be orchestrated to tackle the issue of food poverty [see Appendix L].

- a. The Seeding Resilience project continues to **emphasize collective decision-making and everyday use of its assets while exploring shared ownership models.** The Buffalo Food Equity Network (BFEN), along with its community partners and regional Food Access network, helped organize the Seeding Resilience project in the early days of the COVID-19 pandemic.
- b. The Public Land for the Public Good Working Group is **creating policy to develop sites of production** that operate with increased **self-sufficiency and collective decision-making.** Led by the Partnership for the Public Good, this initiative will improve the stewardship of city-owned land.
- c. The Local Initiative Support Corporation (LISC) in WNY is working on **a plan that could help develop contracts between community groups and developers in East Buffalo** while also helping to direct special fees or taxes levied by the city to create community wealth.
- d. The Rochester Area Community Foundation and the Genesee Land Trust are working on **exploring how their land can be used as an anti-racist organizing tool.**



- ⑥ **Many initiatives are not built on a platform of governance, management, and adequate, stable financing** that will ensure a sustained response involving food disparity prevention, analysis, intervention, and evaluation.
- ⑦ **Resident-led solutions that transform distressed communities and neighborhoods into healthy ones** are making them good places to live, work, conduct business, and raise families. These resident-led efforts are also improving local food environments by providing capital that supports the development of local leadership and the creation of affordable food, businesses, and improved community facilities.
- ⑧ There is an expansive tapestry of low-income, BIPOC (Black, Indigenous, and People of Color) people living in urban, rural, and tribal areas in the Western New York Region, focused on unique food system goals. **Local responses to community food needs and supply challenges are moving from charitable systems to an increasingly decentralized mechanism** for a more self-sufficient, reliable community food system infrastructure. Although not wholly food sovereign, Gakwi:yo:h Farms offers essential insight into what regional collaborative food sovereignty and capacity-building partnerships might look like [see Appendix L]. Where food independence principles and practices exist, they represent a huge opportunity for the region to enhance how the land is worked and support farmers with added capacity and technical assistance programs.

9 Structures of management and management groups are lacking.

A large number of organizations and entities are committed to community wealth creation, yet only a few start enterprises to fill the community food infrastructure gaps. Even fewer merge with other regional enterprises to create financial, political, built, and natural cycles back into the community-based food distribution supply chain.

10 There is an opportunity to feed investment into WNY Healthy Food Priority Areas (HFPAs) to provide more options to areas with an overabundance of fast food and junk food.

Improved food and nutrition interventions are needed to facilitate public health concerns, improve existing poor health outcomes, and reduce the premature loss of life evidenced in communities and households that have been made vulnerable [see Appendix L].

11 There's a significant digital divide in WNY—not just in Buffalo.

There is a multitude of languages used in East and West Buffalo, but how is multilingual information going to be disseminated? Thoughtful and precise planning for execution is important yet rarely implemented. There are many opportunities beyond the already well-funded default community organizations that are over capacity and take on extra work to secure additional funding, which relegates impact and downgrades this as a priority.





**ACCESS, EQUITY,
AND SOVEREIGNTY**

RECOMMENDATIONS

RECOMMENDATIONS

The bulk of these recommendations centers on opportunities for funders to most effectively make racial equity an integral part of building the capacity of FFWNY as a collaborative initiative. In this way, we are intentionally leading food and racial equity work in the region. When this work is done with intention—by fully incorporating the full range of criteria and applying an equity lens—the Justice, Equity, Diversity, and Inclusion (JEDI) principles and approach can bridge differences and give rise to transformational change. However, this can only happen if measures are considered and applied equitably to all involved in the FFWNY community.

WORKING WITH A RECONSTITUTED ACCESS, EQUITY, AND SOVEREIGNTY WORKING GROUP, PROJECT STAFF SHOULD:

1. **Establish Food and Racial Equity as an integral part of FFWNY** that advances the initiative's collective understanding and work on food and racial equity. A racial equity lens should be used from the beginning of the development of proposed recommendations through implementation and evaluation to impact processes and outcomes.
 - a. **If the Regional Council (RC) votes to establish a Food and Racial Equity (FRE) Council, an interim FRE Steering Committee should first be formed.** A process should be put in place to develop a cohesive group where people listen to each other with interest and respect. The committee should build upon the AES Work Group mission and goals of establishing a baseline of JEDI and point to successes that are meaningful to a large number of WNY residents. A brainstorming session, co-facilitated with Food for the Spirit's Buffalo Food Equity Network (BFEN) will help get this process underway. *Note: Details about the composition, goals, and role of the FRE Steering Committee are contained in the Organizational Infrastructure section of the Recommendations.*
 - b. **Develop a set of decision-making criteria or guidelines in partnership with food system actors (including farmers and producers) of color** across the Western New York region to ensure that racial equity is a priority in the decision-making process for prioritizing new investments.
 - c. **Build capacity for crafting and implementing equitable organizational policies** through an inclusive and collaborative process.
 - i. Direct capacity-building toward sessions that prioritize BIPOC and individuals on the margins and under-resourced communities. See Inclusion and Transparency recommendations for details.
 - ii. Work with the AES, Finance, and Investment WGs toward building a consensus in describing what the ecosystem of support may need to look like in order to have partnerships for equitable investments into Healthy Food Priority Areas (HFPAs).

- ② Support East Buffalo - In acknowledgment of the racist terrorist attack in Buffalo, **establish a food and racial equity fund, within the broader FFWNY Fund, to equip BIPOC leaders with the skills to advance racial equity.** This dedicated fund should also support Black-led groups working to end food apartheid and violence or provide mental health resources on Buffalo’s East Side (list developed by the Buffalo Food Equity Network).
- a. **Invest in the African Heritage Food Co-op as an anchor business on the East Side of Buffalo’s Fruit Belt community.** Building on the assets already secured—a sizable building in the neighborhood, design plans, grants and capital from other sources—investment should focus on completing the project, building awareness and support in the community, and providing working capital to begin operations.
- ③ **Use campaigns, charters, and action plans to increase the number of producers, consumers, and landowners actively managing their agricultural land.** Within the next 3–6 months, invest in 1–2 intermediary organizations to bring regional partners with different roles in the initiative forward, such as Grassroots Gardens WNY, The Public Land for Public Good Work Group at the Partnership for Public Good, Cooperation Buffalo, and other food system actors interested in securing long-term stewardship of the land.



- a. **Hold a series of convenings to reflect on efforts underway in the region** that prioritize vacant lots, abandoned properties, access to reliable land to address speculative gentrification, and the city's stance on the disposition of land in urban and metropolitan areas. Stakeholder interventions include:
 - i. **Investing in parcel acquisition** in highly gentrified areas.
 - ii. **Securing permanent land ownership and control models** through local government policies and land trusts.
 - iii. **Increasing the number and varieties of foods produced**, expanding the cultivation of Indigenous crops and raising culturally significant animals.
 - iv. **Investing in nonprofit community gardens and privately managed market gardens** (used to grow fruits, vegetables, flowers, and herbs) to increase opportunities for access or exchange on off-site farmers' markets and hubs in HFPAs.
- b. **Work with Cooperation Buffalo to help establish ownership control models** such as conservation easements, trusts, cooperatives, etc., for reliable land access.
 - i. Support youth programs that teach self-sufficiency and food sovereignty concepts.
- c. **Coordinate with the Food Systems Planning and Healthy Communities Lab (UB Food Lab) on a framework to engage** the city and regional council members and planners, community food system leaders, and support groups, centering on a food insecure community and/or a historically underserved group in the community as a pilot.
- d. **Help devise regional and citywide blight campaigns, charters, and action plans.** The action plans should create a mix of strategies that have the potential to unlock cost savings, tax revenue increases, and other benefits to help increase acres of parcel acquisition into sites of production and self-sufficiency. (See Community Engagement in Healthy Food Priority Areas.)



④ **Facilitate community engagement to map, plan, and create HFPAs across urban, peri-urban, and rural geographies.**

- a. This process should begin within three months. At the outset, this should **include the creation of a series of maps determining HFPAs across the different geographies** (with assistance from the UB Food Lab), as well as development of culturally relevant health communication strategies. See Food, Health, and Community Wealth for details of this recommendation.
- b. **Develop a regional community ambassador program** to increase and strengthen community-based and informed planning that shapes effective local response, decision making, and outcomes.
- c. **Invest in health maintenance and improvement in awareness and health behaviors** in HFPAs and for those with chronic diseases.
- d. **Support healthy food community advocates and health workers**, such as CoNECT’s Community Health Workers, to enhance their ability to find, connect, and work with people who show signs of household food insecurity.
- e. **Bring community members and local food system actors into the process of understanding local food and information needs and supply challenges.** Work with organizations such as the Good Food Buffalo Coalition to ensure community involvement and training in “rebuilding” local food health systems with external emergency providers.

- f. **Invest in employment and training opportunities for SNAP participants** that subsidize work-based learning (SWBL) activities and wages for work on sites of production in HFPAs. This might include internships, pre-apprenticeships, apprenticeships, customized training, transitional jobs, incumbent worker training, and on-the-job-training as defined under the Workforce Innovation and Opportunity Act (WIOA).
- g. **Provide investments for community-driven health** and positive nutrition education, food health marketing, and physical activity habits (at local stores, food pantries, community gardens, community festivals, and events) to address chronic illnesses in HFPAs.
- h. **Enhance and increase fruit and vegetable prescription programs**, such as Buffalo Go Green and Jericho Road Community Health Center, where people learn how to shop smarter and work with participating vendors who are local pillars in their community.
- i. **Increase and strengthen community engagement and outreach in culturally sensitive ways**, i.e., with taste tests, by increasing refrigerator access to local stores, and other resources to improve residents' capacity to have access to nutritious foods.
- j. **Increase culturally informed nutrition-based food preparation programs and distribution.** Ensure these programs consider individuals' capacity and capabilities for preparing and storing foods at home.
- k. **Build marketing capacity for Buffalo's community gardens** so residents are aware of their locations and that they are free to access and participate.
- l. **Work with Community develop and/or revitalize HFPAs, defined as** low-income, underserved neighborhoods that have experienced significant disinvestment. These should be a range of activities such as economic development, sanitation, streetscaping, and neighborhood planning projects.

- m. **Provide ongoing investments in technology, communications, and Healthy Stores programs** infrastructure and other needed assets aimed at improving the food environment in HFPAs.
- n. **Continued investments in the Healthy Corner Store Initiatives (HCSI)** in Buffalo, Niagara Falls, and expansion to Rochester, alongside other geographies that are part of Local Food and Community Resilience Networks. Investments include façade improvements and interior décor, Point of Sale systems and kiosks.
- o. **Create and invest in preexisting healthier food pantries** that include culturally appropriate foods, partnering with food distribution efforts including those led by local church and community centers engaged in healthy food access efforts for their respective communities.

5 **Wealth creation in urban and rural communities**

- a. Over the next three months, partner with specialists in wealth creation to **work with NYSAWG, funders, and potential intermediaries from the RC, on developing a framework for value chain exploration.** One that aligns with values for sustainability and best practices for developing closed-loop, community-owned supply chains. Work with all Work Groups to collectively develop proposals that invest significantly in a wealth creation value chain approach. This method will replace the extraction of wealth and exploitation of resources to which poor rural and urban areas have long been subjected. See Appendix L for details of this recommendation.
- b. Over the next year, **invest in the startup of 5–10 micro and social enterprises, cooperatives, and programs** that create community-owned grocers and farmers' markets in under-resourced parts of the region on behalf of HFPAs. Work with social enterprise startups, such as Providence Farm Collective, African Heritage Food Co-op, Taproot Collective, Project Rainfall, Kubed Root, and Farmer Pirates Compost.

c. **Develop culturally relevant health communication strategies that provide outlets to local urban and rural farmers** as well as local cottage industry entrepreneurs by developing a pipeline for BIPOC farmers and producers to connect with urban and rural markets, especially markets with audiences who are from the same cultural demographic.

6 **Organize a regional food sovereignty partnership**, beginning in the fall of 2022, to promote, encourage, and build support for food sovereignty initiatives around the region. The partnership will highlight, support, and build upon the work of Gakwi:yo:h Farms and the Seneca Nation of Indians. The Intertribal Agriculture Council, which has worked with Seneca Nation of Indians on advocacy and funding opportunities, should also be involved at this initial stage. During this time, other food sovereignty leaders who can provide agricultural technical assistance across WNY's nine counties will also be identified and engaged.

a. **Develop partnerships and support funding with nonprofit organizations and community-based groups** who are developing new pathways and innovative distribution models that mobilize emergency food providers and temporary food banking services towards increased food sovereignty.

b. Inclusion and Transparency

i. **Create multilingual social network communications and an information hub** that is linked to the FFWNY website as a central place for project work/deadlines and resources. Explicitly, it must meet the AES workgroup's purpose through a connection to deliverables, including FFWNY's position on racial, economic, and social inequities, as well as address the digital divide by engaging multiple modes (face-to-face, blended/hybrid, online) of delivering information.

ii. **Create a webinar series on prioritizing BIPOC food system actors** across the WNY region with speakers from around the country to leverage resources, time, and experience.

A blue-tinted photograph of a tractor pulling a trailer through a field of harvested crops. The tractor is in the foreground, and the trailer is behind it. The field is filled with harvested stalks, and a cornfield is visible in the background under a cloudy sky.

FARMERS & PRODUCERS

FINDINGS

FINDINGS

Western New York is home to a wide array of farms, from small direct-to-consumer product and meat operations to large dairy and commodity farms that export a majority of their products outside the region. Despite its shorter growing season, the region has strengths in its combination of fertile soils, moderating impacts of the lakes, and farmer resourcefulness. These strengths have empowered the region to build a diversified and productive agricultural economy that is less dependent than others on international market prices or federal commodity programs. Dairy farms, however, which comprise the largest share of both land use and agricultural sales, face similar problems to other commodity producers, particularly low or unpredictable prices for their milk.

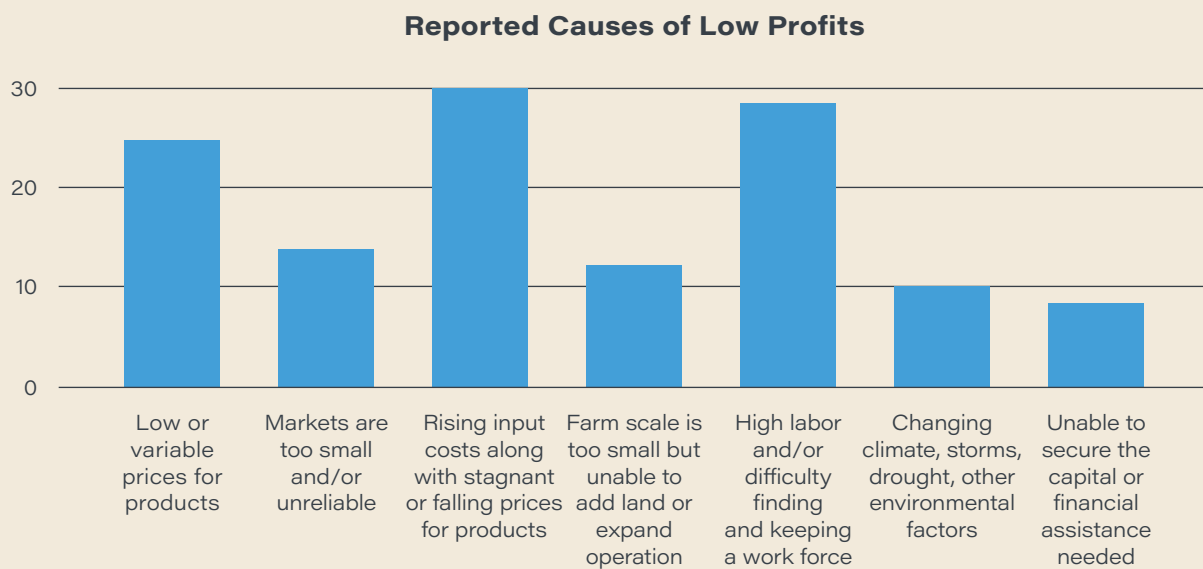
Compared with other agricultural regions, WNY has historically had a strong processing industry for fruits, vegetables, and dairy. Even as major processors have closed, new ones—both homegrown and via larger corporations based outside of the region—have emerged recently, working with everything from cheese and yogurt to frozen vegetables to smoked meat products. These businesses expand farmers' options, extend local food seasons, and provide a modest amount of employment.

The COVID-19 pandemic had a mixed impact on farmers. On one hand, it drove up input costs, increased waiting times for materials and equipment, and in some cases, made seeds, feed, and supplies simply unavailable. At the same time, most farmers reported increased sales, particularly during the first year of the pandemic, with 43% reporting modest to substantial increases in sales, compared with just 11% reporting a decline in sales.

SPECIFIC FINDINGS:

- 1 **Nearly half of all farmers report either zero profitability or highly variable profitability year-to-year.** According to our survey and discussion with farmers, most report modest to substantially increased sales over the past few years, some of that driven by COVID-related food supply concerns among consumers. In spite of these generally increasing sales, however, almost half of farmers report that they are either not profitable or that profitability is highly variable from year to year.
 - a. Smaller, newer, or urban farmers are the least likely to be profitable, compared with somewhat larger and more established operations.
 - b. The three most important challenges to profitability cited by farmers were:
 - i. Rising input costs combined with stagnant prices.
 - ii. High labor costs and limited availability of skilled labor.
 - iii. Prices for their products are too low or variable.

c. Farmers selling direct-to-consumer (DTC) were not more profitable on average than farmers overall, in spite of receiving retail prices for their products. We suspect that this is primarily a matter of scale i.e., DTC farmers overall are much smaller and newer, and as a result pay more for inputs and lack a sufficiently large customer base to achieve good returns.



2 Small- to mid-scale meat producers are in a crisis due to a lack of adequate or reliable processing for their animals. Confirmed by surveys, interviews of farmers and CCE staff, and the reality of additional closures of meat processing plants during the project, this shortage has meat producers facing severe delays in getting animals processed, leading to increased cost of production, decreases in quality (when the animal passes optimal age for processing), and loss of markets and customers. The consolidation of farms and processors has exacerbated the gap, as larger processors are much less likely to work with smaller producers of beef and pork.

While three new meat processing facilities began operations during the project period, at least two also shut down, in part due to the owners “aging out” and in part due to challenges of labor and profitability. Expanding meat processing capacity, especially for smaller scale producers, is critical to the region’s food system. This will have the added benefit of encouraging ecological ranching practices, since most smaller scale meat producers in the region use rotational grazing and other carbon-sequestering methods. New emerging facilities also need attention, particularly those that have developed a lower cost, more farmer-based approach.

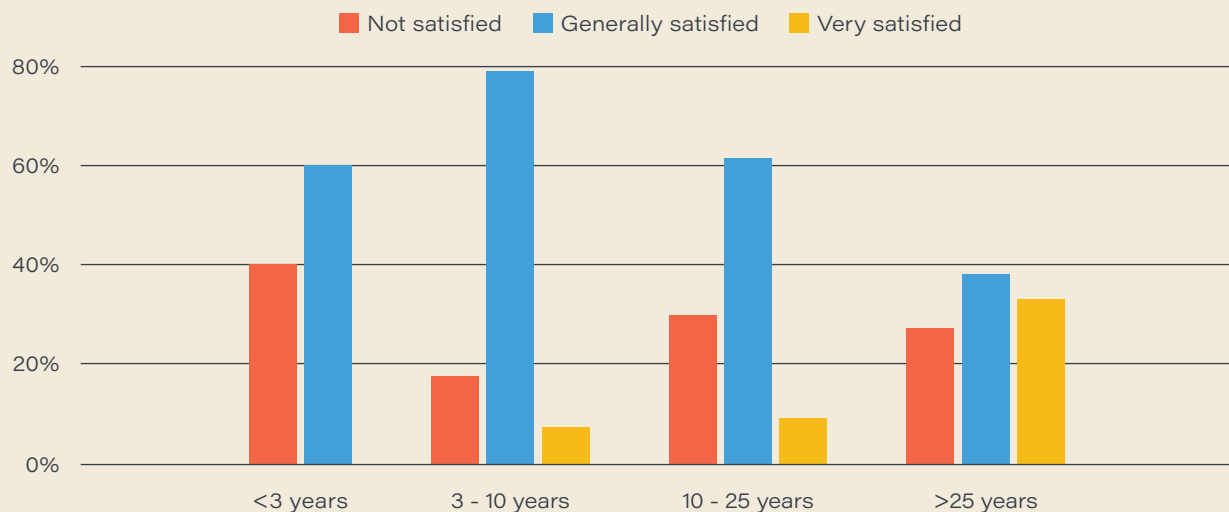


3 Across types and scale of farming operations, there's a need for more and/or better markets.

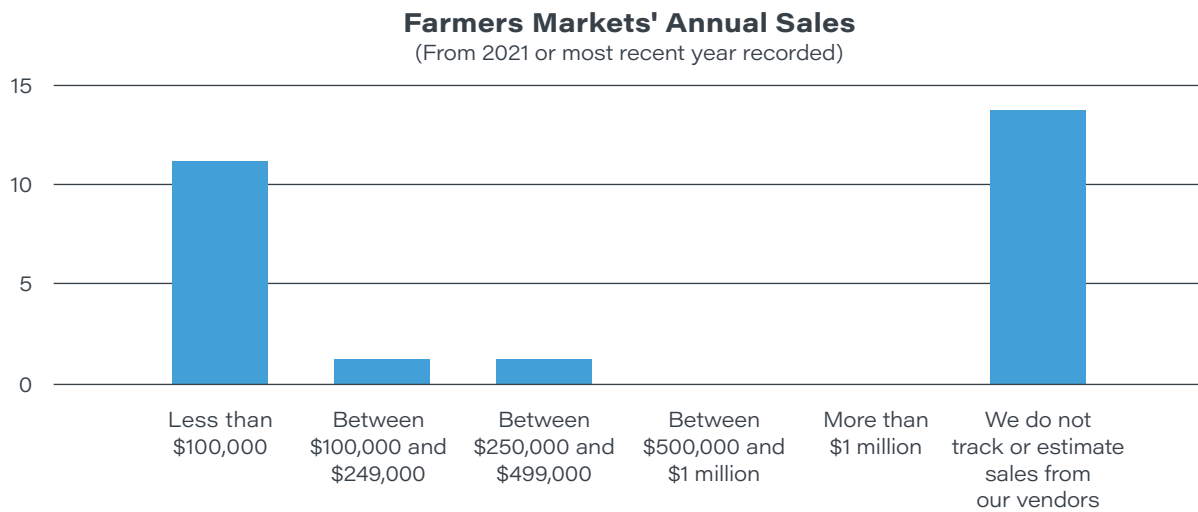
Less than two in ten report being "very satisfied" with their current markets, while the balance are either not satisfied (25%) or generally satisfied but interested in new or better paying markets (60%). Interestingly, farmers who have been in operation the longest, 25 years or more, are most likely to express strong satisfaction with their markets, while the newest farmers (three years or less) are most likely to be unsatisfied. The majority of farmers are seeking markets that are both more reliable and better paying. A small proportion of these are pursuing or considering sales to institutional markets (schools, colleges, etc.) or one of the region's food hubs, though these tend to be somewhat larger or more established farmers.

- a. Farmers have widespread interest in increasing consumer awareness of and commitment to local food purchasing. Like most regions, the proportion of WNY residents who regularly purchase local foods is quite small, even among those consumers for whom cost is not a major limiting factor.
- b. Some "buy local" efforts have been made, but the region lacks coordination and sustained efforts.

Farmer Satisfaction With Current Markets by Years in Operation



4 **Farmers markets provide the “face of local foods,” helping to incubate newer farmers and food producers at very low costs.** The relatively large number of farmers markets in the nine-county region—about 55—is both an asset and a problem, as most remain very small in terms of both numbers of vendors and annual sales. (The nine-county region of southwestern Virginia, by comparison, has fewer than 20 farmers markets). While the short season contributes to the limited sales, the numbers are still surprisingly low, with the majority of responding markets reporting less than \$100,000 per year in total sales. Assuming an average of 15–18 vendors selling for 20 weeks, this translates to weekly average sales of only \$300, far below what farmers need to justify regular presence at a market.

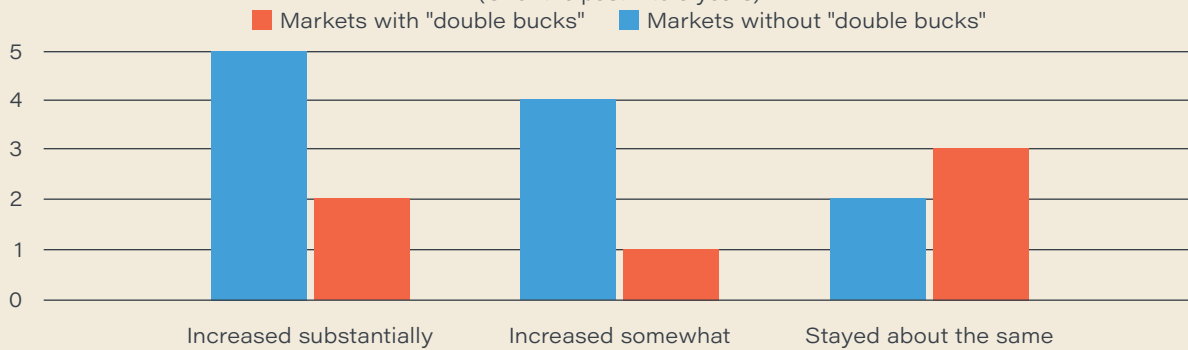


The most productive strategy to strengthen existing markets and, in some cases, is to consolidate small markets competing for vendors and customers. However, underserved communities, both urban and rural, would still benefit from new markets with careful planning to increase the potential for a strong customer base.

Low-income customers are also a factor, with farmers markets seeing increases in redemption of SNAP benefits, as well as other benefit programs, like the Senior Farmers' Market Nutrition Program. Markets offering Double Up Food Bucks (which match SNAP EBT dollars for fresh fruit and vegetables) have seen considerably greater increases in SNAP sales, making the case to increase the number of markets with these offerings.

Change in Use of SNAP and/or Other Benefits Programs

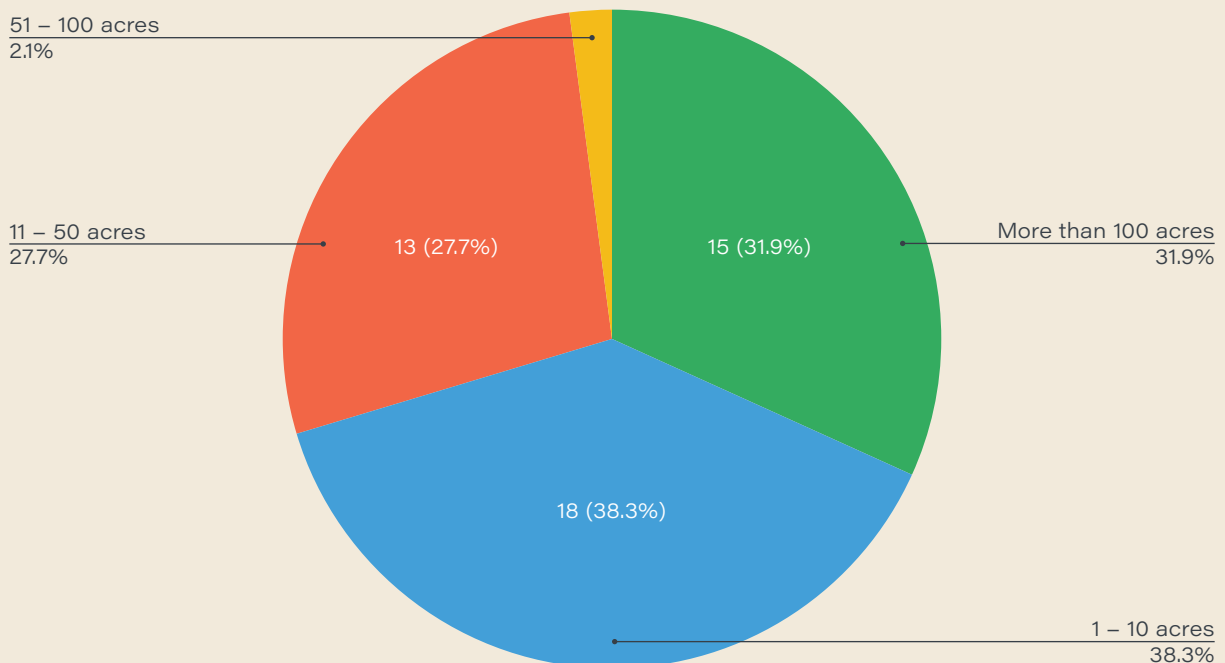
(Over the past 2 to 3 years)



5 More than a third of farmer survey respondents report that they currently sell some of their products to lower income households. This is happening either directly (for instance, through SNAP benefits at farmers markets) or by selling to organizations serving these communities. Another 9% state that they have tried this, but have been unable to make it work.

6 Despite rising land prices, most farmers indicate access to additional land. Out of 61 respondents, 47 indicate that they have some excess land—ranging from just a few acres up to 100 or more—that is suitable for production but not currently in use.

Additional Land Available to Farmers



7 **On-farm infrastructure is inconsistent and generally insufficient for farmers in WNY**, cited as one of their top four profitability issues. This includes production infrastructure, such as season extension tunnels and hoop houses, as well as cold storage and freezer capacity. CCE personnel verify that the number of farmers utilizing season extension is low, especially given the short season faced by produce growers.

- a. There is interest in equipping farmers with on-farm cold storage capacity, using either low-cost technologies like a CoolBot, or in concert with other farmers or distributors through some type of sub-hub facility.
- b. For startup farmers, farm capacity is also limited by a lack of essential equipment, whether that be a BCS walk-behind tiller, a reliable drip irrigation or animal watering system, or other basic needs. Building a more regionally based food system is a “chicken and egg” dilemma: on the one hand, creating market demand requires a diverse and reliable supply of quality food products, and on the other, persuading farmers to expand or diversify production requires growing and reliable market demand. Therefore, production capacity of farmers through better on-farm infrastructure is needed to grow both supply and demand.





- ⑧ **Urban farmers cite lack of commitment to urban agriculture from local government as their biggest constraint.** While farmers acknowledge the limits of urban farming, such as the relatively common contamination from past uses, they cite a lack of clarity from local officials and preference for commercial development as the biggest obstacles to their expansion and profitability.

There is considerable potential for expansion of both the number and scale of urban farmers in Buffalo and Rochester, as well as possibly smaller cities like Niagara Falls. The total number of urban farmers in the region's two major cities is very small because of several key factors: access issues (stemming largely from local policy and priorities), lack of essential infrastructure (particularly reliable and clean water sources), and the problem of soil contamination. On the last point, a larger scale effort to support the creation of commercial scale raised beds, using compost sourced from local suppliers like Farmer Pirates Compost, could help support current growers while also helping to jump-start new urban farms. Growth remains contingent, however, on cities prioritizing urban farming.



FARMERS & PRODUCERS

RECOMMENDATIONS

RECOMMENDATIONS

The following recommendations grew out of the Farmer Work Group, along with three subgroups from within the Work Group. Their priorities and ideas were considered in light of the research, survey findings, site visits, and interviews SCALE conducted. There is an emphasis on concrete steps that can and should be taken, some relatively simple and short-term, others requiring further exploration, development, and modification over time.

Note: Appendix N contains policy priorities supported by many farmers involved in this process.

① **Increase the viability of WNY farmers, particularly newer, limited resource or BIPOC farms, through a systematic effort to expand demand for local foods and improve access to well-paying markets.**

Among other steps, this should include:

- a. Building upon the Know Your Farmer Facebook group begun in 2020, launching a regional “Buy Local” campaign that encompasses a combination of farm and food public events, creating and disseminating simple educational and promotional materials, coordinating regional or sub-regional branding, and expanding opportunities for people to purchase from local farmers across the region through both virtual and brick-and-mortar marketplaces.

To create the campaign, we recommend NYSAWG convene (in winter 2022-2023) two to three sub-regional gatherings of farmers and food entrepreneurs who sell direct to consumers, marketing staff from CCE, and representatives from New York State Department of Agriculture and Markets to develop a detailed plan and timeline for the campaign, with the goal of a June 2023 launch. Other regional “buy local” campaigns should be examined, including Southern Tier West’s Buy Local campaign, as well as an assessment of Massachusetts’ “Local Heroes” campaign, Harvesting Support for Locally Grown Food.

Appendix H offers a number of tested ideas and proven strategies that other regions have used to expand the demand for local foods.

- b. **Work with and support the three primary e-commerce food platforms in the region—FreshFix, Produce Peddlers and FarmDrop—to expand ease of access and volume of sales for farmers through these platforms.** We recommend a virtual gathering in fall 2022 between these three businesses, and current and potential farmer suppliers, to identify opportunities, challenges, and specific products for which there is unmet demand.

Note: An increasing number of farmers are utilizing or developing their own e-commerce retail presence, which should be encouraged as well.

A region-wide online directory of retail and direct-to-consumer options for local foods could increase customer awareness of local food options and purchases. This should be explored in conjunction with the development of online funding platforms and resources, delineated in the **Finance and Investment** recommendations.

- c. **Strengthen key farmers markets that have focused on growth of both customers and vendors over the past few years.** The right steps can dramatically increase the customer base, average sales for participating farmers, and the number and diversity of vendors. Existing regional and state-wide farmers market networks can offer training, sharing of best practices, and more. The Southern Tier West Farmers Market Network and the New York Farmers Market Federation should collaborate on identifying 5–10 markets with strong potential for, and commitment to, growth, developing customized strategies with these markets.

Additional specific ideas for growth, such as using the results of STW's farmers market customer survey to shape the campaign, are contained in Appendix H.

- d. **Help farmers develop “debit cards” specific to their farm products.** These will let customers “pre-purchase” products in substantial increments (\$100–\$200) while preserving complete discretion as to what they purchase from a farmer. Produce debit cards could also be made available to lower-income households with a dollar-for-dollar match provided by regional funders. This latter effort must be funded by grants and/or donations to work, much like Double Up Food Bucks at farmers markets.
- e. **Increase access to larger markets through the gradual development of a network of sub-hubs across the region.** This will reduce the time and travel necessary for farmers to reach specific buyers, distributors, or food hubs.

*Find more detail on this idea in the **Infrastructure** recommendations.*

- f. **Convene farmers interested in exploring cooperative or joint marketing with leaders of the region's three main food hubs.** In fall 2022, invite farmers to collaborate with Eden Valley Growers, the Western New York Food Hub and Headwater to examine whether current aggregation and marketing systems are meeting the needs of smaller, newer, and limited resource farmers. From here, a farmer-based marketing entity or modifications to the existing hubs should be considered. Current capacity and expansion of coordinated marketing production planning should also be assessed.

This strategy dovetails with the development and strengthening of farmer networks, described later in this section.

- ② **Increase access to quality, affordable farmland, with particular focus on new farmers, BIPOC farmers, and urban growers.** Though highly variable, land costs are increasing steadily due to a combination of land speculation, development pressures, competition from large solar companies, and consolidation of small to midsize farms. Access to land is particularly difficult for urban, BIPOC, and newer, younger farmers, as well as those close to urban centers. Given this context, we recommend:

- a. Working with the Greater Buffalo Urban Growers (GBUG) network to facilitate meetings with key staff and elected leaders in Buffalo to increase the city's commitment to urban farming in relation to land use and development. GBUG has already identified key steps the city can take to expand and support urban farming and build relationships with key officials.

Their work and plan should provide the foundation for additional advocacy with the city. They need sustained, vocal support from leaders of the FFWNY to mobilize the Buffalo public in support. Realtors and developers will also be a key strategic ally because of their major influence over city policy. Outreach to the more sympathetic developers has begun and should be further supported.

- b. As the Buffalo process progresses and the most effective strategies become clear, Rochester's urban farmers should develop their own comparable strategy adapted to the political realities of their city.

“WE ARE MOST CONCERNED ABOUT THE EAST SIDE (SPECIFICALLY FRUIT BELT) AND BLACK ROCK RIVERSIDE GARDENS RIGHT NOW RE: CONSERVATION/PROTECTION IN LAND TRUST AS THOSE ARE BOTH HIGH AREAS OF DEVELOPMENT..WE WANT TO SEE THE LAND PROTECTED FROM DEVELOPMENT SO THERE IS ALWAYS SPACE IN EACH DISTRICT FOR FREE GROWING OF PRODUCE FOR COMMUNITY MEMBERS...”

– **JEANETTE KONCIKOWSKI**, DIRECTOR, GRASSROOTS GARDENS WNY

- c. The four land trusts in the region (Western New York Land Conservancy, Genesee Land Trust, Genesee Valley Conservancy, and Grassroots Gardens WNY)—which are already engaged with farmland preservation and, to varying degrees, support for new farmers—should join forces with WNY funders to raise capital. Philanthropic and private investment for the purchase of good farmland in the peri-urban areas of Buffalo and Rochester—for lease (and eventual purchase) by BIPOC and other limited resource farmers—will help catalyze broader commitments to preserving working farms. It will also help to incubate farmers of color and others struggling to access land. In addition, we recommend a communications and policy campaign to promote an increase in funds for conservation easements, in concert with the land trusts.
- d. Invest in promising farm incubators focused on BIPOC and limited resource farmers, such as Blegacy Farms. Investment could include critical infrastructure needed on a working farm (irrigation, fencing, season extension, storage, cooler space, etc.), purchase of essential tools and small-farm equipment, and a modest "working capital fund" available to help start-up farmers with purchase of seeds, plants, compost, etc. This effort could be a joint fundraising effort, including crowdfunding and matching funds from foundations. Additionally, we recommend financially supporting exploration and feasibility analysis for a cooperatively owned and run regenerative livestock farm, focused primarily on Latino/a farm workers striving to transition to farm ownership. Ignacio Villa has spearheaded this effort to date.



3 Cultivate and support the next generation of farmers through investment in farm and food apprenticeships, farmer networks, and programs to link new and aspiring farmers with retiring farmers.

This is closely related to increasing land access and affordability.

- a. Partner with established farm-based apprenticeship programs to strengthen and expand/replicate them in farms across WNY. We recommend a joint initiative through which NYSAWG or other non-profits secure funding for apprenticeships and farm training programs, and then sub-contract with practicing farms for the training and mentoring needed. Two effective, farm-based apprenticeships provide an excellent starting place to test and build this partnership: Root Down Farm in Clarence Center (northeast of Buffalo) and Wild Hill Farm in Bloomfield (south of Rochester). These innovative working farms are best suited to design and implement apprenticeship programs, but lack access to needed funds. Once the partnership has been established with these two farms, additional interested farmers should be identified in other parts of the region, then trained and mentored to develop their own apprentice programs.
- b. Work with American Farmland Trust to strengthen and expand their “Farmland for a New Generation New York” program, which helps pair retiring farmers with new and aspiring farmers. This will promote awareness of the opportunities among both retiring and aspiring farmers. Similarly, FFWNY should monitor the progress of the NorthEast Farmers of Color Land Trust and consider investing accordingly.
- c. Expand access to technical support and information for new and aspiring farmers. We support an emerging partnership with the Buffalo & Erie County Public Library to disseminate resource materials available through CCE, the Northeast Organic Farming Association, Small Business Development Centers and similar entities. The library partnership could also include materials for consumers interested in purchasing from local, sustainable producers.



- d. Facilitate peer learning, access to information, and reduction of input costs through the formation or strengthening of informal farmer networks. We recommend supporting two farmer network efforts:
 - i. Work with Cornell Cooperative Extension Monroe County to organize and launch a farmer-driven bulk-purchasing network, beginning in the fall of 2022, and in time for the 2023 season. This may initially focus on the needs of produce farmers, including seeds, greenhouse supplies, plastic mulch, and other materials. By 2024 it should be expanded to include small to midsize meat and dairy producers who need to procure feed, hay, fencing, and other supplies.
 - ii. Build on the work of the farmer network sub-group to collaborate with The Grange in WNY, who have shown interest in rejuvenating their chapters and collaborating with newer, younger, and more diverse farmers.

Note that farmer networks can and should also be a vehicle for supporting BIPOC, new and limited resource farmers, as well as promoting regenerative farming practices. As part of the latter, supporting the expansion of composting and waste reduction efforts might also benefit from joint actions across farmer networks. Farmer Pirates Compost, Noblehurst Farms, and Buffalo Worm Works offer various effective approaches to waste reduction and composting and should be central to furthering efforts in this area.

④ **Dedicate a stream of funds for investment in critical on-farm infrastructure, particularly for newer, limited resource, and BIPOC farmers.** This should take the form of a cost-share, with the proportion of funds provided by the farmer scaled to their capacity. Some of the types of infrastructure and equipment that might be supported include:

- Season extension through hoop houses and high tunnels
- Drip irrigation systems
- On-farm coolers, including cost-effective systems like a CoolBot, as well as on-farm freezers
- Value-adding facilities, such as on-farm creameries, small processing rooms or packing sheds
- Small-scale farm equipment ranging from BCS walk-behind rototillers to shared ownership of specialized implements and equipment
- Waste reduction, composting, and nutrient cycling systems





MARKETS, INFRASTRUCTURE, AND SUPPLY CHAIN

FINDINGS

FINDINGS

Demand for locally (or regionally) produced food has been growing steadily in many parts of the region for more than a decade. During the first year of the pandemic, demand spiked sharply, as more consumers became concerned about the reliability of global supply chains. Most farmers, farmers markets, and other retail outlets experienced this increase in demand, though many also experienced a drop in the second year of the pandemic, as more conventional outlets stabilized their supplies. Nevertheless, the "covid bump", as some have called it, demonstrated that there is a significant latent or potential demand for healthy local foods among people who are not already committed to local purchasing. Nurturing that demand will require widespread and regular communications about the benefits of local and healthy eating, along with steps to increase and diversify production while expanding the convenience, and in some cases, affordability, of local food purchasing.

A related and more recent dimension of food purchasing is the increased interest in heritage and culturally relevant foods, particularly among immigrant, Native American, and African American communities. Growing demand for foods of this type has been demonstrated by the farmers and customers of the **Providence Farm Collective**, as well as the native varieties produced at **Gakwi:yo:h Farms**. Rising demand for halal meats in some market channels is another example of this demand and has led Headwater Food Hub to partner with a halal processor for some of its meat supply.

Overall, food system infrastructure in the region is relatively well developed. For example, NYS ranks second nationally in the number of food and beverage processing plants, including dairy processing, frozen and canned food manufacturing, wineries and juice manufacturing, and numerous others using products sourced within and outside NY.¹ According to the UB Food Lab's recently completed regional data mapping tool,² there are 479 food processing facilities in WNY employing over 12,000 people. This includes 10 cheese processors, 6 butchering facilities, and 22 facilities that process food products either through freezing, canning, or other methods. However, major gaps persist, particularly in meat processing and in access to aggregation, distribution, and food processing facilities suitable for smaller and mid-scale producers, all of which are unevenly available in WNY. The presence of Eden Valley Growers, Western NY Food Hub, Headwater Food Hub, Brigiottas, United Apple Sales, and Upstate Niagara Cooperative enables market access for hundreds of small, midsize, and larger farms producing milk, meat, produce, fruit, and some value-added products. For example, approximately 95% of survey respondents reported they regularly purchase dairy products from the regional dairies with over 40% reporting purchases between \$1,000 and \$10,000 weekly and some more than that.

1 New York State Food Supply Resiliency Report, 2021 NYS Dept. of Ag and Markets, P16 -17

2 Growing Connections - Nourishing a Region, developed by UB Food Lab, <https://sunny-buffalo.maps.arcgis.com/apps/MapSeries/index.html?appid=7a3b2029ff374ac282a90573776ebffe>

SPECIFIC FINDINGS:

- 1 **Locally grown food with secondary benefits—such as those from BIPOC-owned businesses—represents a huge opportunity for WNY anchor institutions, farmers, and food entrepreneurs.** There are exemplary institutions already purchasing a considerable percentage of their food from local sources. Most notably, Buffalo Public Schools and the University of Rochester. Outside of these and a handful of other schools and universities, however, institutional procurement is largely untapped as a market. In NYS, there are over 270 public and private colleges and universities. The SUNY system alone comprises 64 campuses and serves over 500,000 students and faculty with annual food purchasing budgets of approximately \$150 million. A recent study calculated that if SUNY spent 25% of its food budget on fresh and minimally processed NY-grown foods, it would create \$54 million in economic output for the state.³

Interest among WNY institutions in expanding their purchasing from local and BIPOC farmers grew steadily throughout this project. This was evidenced in both survey responses and strong engagement in work sessions that explore the challenges and opportunities in values-driven food procurement. The Buffalo Purchasing Initiative includes 14 large employers, many of whom are anchor institutions in the WNY region, who have committed to increasing the purchase of goods and services from local businesses owned by people of color. During the project, a workshop focused on food purchasing was well attended. A contact list of attendees and other key stakeholders is included in Appendix M. Buffalo Public Schools is working with several producers, including Providence Farm Collective, to coordinate supply with demand and develop culturally appropriate meals. Headwater Food Hub, which supplies a number of institutional accounts, is actively working to build supply from BIPOC suppliers.

³ Thirteen SUNY campuses, 15 Farm to School districts (NYS Funded), and dozens of other institutions of higher education, health care and correctional facilities are located in the nine counties of Western NY. On the Plate at SUNY: Growing Health, Farms and Jobs with Local Food

There are also challenges on the supply side. Institutions and Food Service Management companies are accustomed to the continuous supply of a diversity of products all year long at a low price point. Meeting these expectations, which have been formulated based on national and global food supply chains, is extraordinarily difficult for local and regional supply chains. Several innovative institutions such as the University of Rochester, St. John Fisher College, and SUNY Geneseo have been committed to purchasing from local and regional suppliers and to working with partner organizations to build supply chains, coordinate supply and demand, and be creative in the kitchen.

A consistent and enduring challenge in making institutional procurement work for smaller, newer, and limited resource farmers is the issue of price. Both survey responses and direct conversations with farmers make it clear that most at this level find prices too low for them to profitably sell to institutions. Thus, any expansion in institutional procurement of locally and/or ethically sourced foods from the region will need to be accompanied by some form of subsidy or some recognition of the broader benefits to the economy. Benefits such as increased equity and improved health and well-being for students, staff, and clients of these institutions. The NYS 30% Initiative is one example of this public recognition and support.⁴

Overcoming these difficulties will require: ongoing collaboration between civic organizations and institutions that share successful approaches and foster peer learning; leadership by executive decision makers, procurement, and food service staff at institutions to change internal policy and support its implementation; and changes to state procurement policy to allow more flexibility in purchasing decisions. Progress made by farm-to-school programs across the country and in WNY offers a great deal of insight into how purchasing by higher education and hospitals can be shifted.

⁴ See 30% NY Initiative (<https://cals.cornell.edu/cornell-cooperative-extension/join-us/new-york-state-farm-school/find-farm-school-resources/30-ny-initiative>)

② **Mid- to large-sized supermarkets in the region currently purchase a substantial amount of food (fruit, vegetables, dairy, eggs, and processed products) from regional sources.** In our survey, they indicated that doing so is very important to their business. As a result, the potential for a significant increase in local purchasing from midsize to large supermarkets appears relatively limited. While there may be exceptions to this, in general, established retailers like Wegmans, Tops, and Dash’s already have long-standing procurement arrangements with a range of farmers and distributors. Furthermore, grocery chains are increasingly buying through regional hubs, rather than stores, making the requirements of scale, pricing, and packing more difficult for small to midsize farms. The recent merger of Tops and Price Chopper, a sign of continued industry consolidation, may reinforce this trend.

Having said this, according to interviews with retailers, the demand for local produce and fruit among retail customers is strong. The main barrier reported by buyers in the Markets and Buyers survey was the short growing season for produce in WNY, which limits the continuity of supply. In our interviews with retailers, at least one indicated they would love to double local purchasing in the long term, while a second predicted that demand and purchasing will slow down in the future. According to the survey, expanding the production season through hoop houses, greenhouses, and other approaches—along with better local food distribution—is seen by buyers as the top opportunities to expand local purchasing. Further, the vast majority indicated a willingness to contract in advance for products, which may enable both farmers to invest in season extension and regional distributors to invest in improving their distribution capacity.

③ **The emergence of "alternative retail" is taking several forms, each of which is creating additional demand for locally produced foods:**

- a. E-commerce businesses, including **Fresh Fix, Produce Peddlers,** and **FarmDrop** have all seen substantial growth in both their customer base and the number and types of farms selling through them. All three are in an expansion mode now, looking for additional suppliers in their communities. Quite a few farmers have also launched their own e-commerce efforts, expanding their markets and range of customers.
- b. The potential for new e-commerce businesses is limited primarily by proximity to medium size or larger urban areas where the density of potential customers is much greater. **Produce Peddlers,** which has focused primarily on the greater Buffalo area, is now expanding into the Rochester market. On the other hand, **FarmDrop** is growing steadily, in spite of its very rural location in Linwood, offering four customer pick-up sites.
- c. Mobile markets, discussed earlier in the findings, have also grown steadily, providing improved access to healthier eating at relatively affordable prices for people in lower-income or underserved communities. Focus group discussions with mobile market leaders, as well as considerable research from the University at Buffalo,⁵ make clear that procurement of local foods is a strong value for most but not all mobile markets in the region, and all recognize the trade-off between paying farmers a reasonable price for their goods and selling food at below market or affordable rates. From the cumulative experience of mobile markets in WNY, as well as experience and analysis of mobile markets in other parts of the country, it is clear that very few have the potential to cover all operational costs with sales revenue.

5 For more on UB's work on this, the Mobile Market Coalition and the Veggie Van Training Center see: <https://www.myveggievan.org/>

4 **The most critical infrastructure gap is in meat processing, especially for beef and pork producers.** Developing meat processing capacity, particularly to meet USDA certification standards, requires major up-front investment and is challenging from an operational perspective as well. For these reasons, the creation of new processing capacity in or adjacent to the region is a major development that should be nurtured and built upon to further reduce the meat-processing bottleneck.

- a. In the final months of the project, three new meat processing facilities opened in or near WNY, modestly increasing overall processing capacity in the region. These included **Burley Brothers** near Attica, **Alliance Farm Butchery** in Collins, and **IQRA Meat Packaging**, opening in the former Eklund facility in Stamford, NY.
- b. **Alliance Farm Butchery**, has significant potential to address the meat processing infrastructure bottleneck, especially for smaller and newer producers of beef and pork. The innovative structure of this business has several key features:
 - i. Though animals are slaughtered in a USDA-inspected facility (also being built on-site), the subsequent processing is taking place in their state-approved 20-c kitchen. The construction and operating costs of the kitchen are considerably lower than those incurred in a USDA facility, and they are able to customize cuts and recipes (sausages, etc.) to meet the specific needs of the participating farmers and their members.
 - ii. Most small meat producers in WNY are completely at the mercy of the existing processors, leaving them almost no control over the scheduling of processing dates and no recourse when quality problems occur. AFB addresses this through membership, wherein farmer members pay a modest monthly fee in exchange for predictability of processing slots, as well as better quality of processing. This in turn greatly improves their ability to meet the specific requirements of restaurants, specialty shops, and other customers, while also stabilizing their supply—a feature of great importance to markets.

“WESTERN NY HAS THE POTENTIAL TO BECOME A LEADER IN A LOCAL, SUSTAINABLE, CLOSED-LOOP FOOD SYSTEM. UNFORTUNATELY, IT HAS BEEN CRIPPLED TO THE POINT OF FALLING FAR BEHIND MANY OTHER REGIONS IN THE STATE AND THE NATION. IF THERE WERE THOSE IN A POSITION TO CHOOSE TO MAKE AN IMPACT WHO REALLY WANT TO SEE EVERYONE WHO PARTICIPATES IN OUR LOCAL FOOD SYSTEM THRIVE—FARMERS, CONSUMERS, THOSE EXPERIENCING FOOD INSECURITY AND EVEN THOSE WHO ARE TRYING TO START OVER IN THIS COUNTRY—A GREAT OPPORTUNITY EXISTS. IF THOSE PEOPLE WANT TO MAKE A DIFFERENCE IN THOSE DEMOGRAPHICS BY INVESTING IN INFRASTRUCTURE TO FACILITATE LONG-LASTING RELATIONSHIPS, NOW IS THE CRITICAL TIME TO DO SO.”

– **GREG PUTNEY**, RISE N’ SWINE FARM, HOLLAND

iii. Having members also creates a steady flow of operational capital for AFB. At present, they project about 20 farmer members once the operation is fully launched.

iv. The success of this approach is not yet demonstrated, but the prospects are good. If successful, there is significant potential for replication in other parts of WNY, and commitment from AFB's founders to help do so.

c. Movement is also underway to develop a substantial and reliable supply of affordable ground beef by focusing on "cull dairy cows." Led by Butter Meat Co. and Headwater Food Hub, this effort will help dairy operators secure a good price for their animals who no longer supply milk, while increasing the potential for local meat purchasing from institutional buyers.

d. Due to the impact the pandemic had on meat and poultry processing across the country, USDA has committed to diversifying ownership and scale of processing facilities, strengthening the regional food supply chain, and creating economic opportunities in rural areas. This means that financial support is currently available in the form of grants, loans, guarantees, and technical assistance to fill this infrastructure gap in WNY. Farmers and small businesses have found it very difficult to successfully apply for such resources and will need assistance completing the application process and navigating complex USDA requirements.

⑤ Food-processing infrastructure exists in the region, though inconsistently across the nine-county area. The region is well known for its larger scale processing with brands such as Rich Products, Barilla, Bonduelle, Goya, and many others. These processors are largely sourcing and selling globally through Rich Products and have expressed support for more regional purchasing.

- a. In terms of local and regionally focused efforts, there are several notable entities. The Commissary in Rochester is providing the space, equipment, and technical support to assist food entrepreneurs in developing their products, building their markets, and growing their capacity. Opening its doors in 2021, this enterprise, a program of the Rochester Downtown Development Corporation, provides one example of an effective public-private partnership that benefits small and start-up entrepreneurs. Another emerging facility in Buffalo is the kitchen facility at the Matt Urban Center. Having recently completed their small commercial kitchen, Matt Urban Center is interested in building partnerships with community organizations and limited resource entrepreneurs in Buffalo to utilize their facility to expand access to healthy foods. Additionally, a shared food processing and incubation facility is in the planning stages in Gowanda, in the southern part of Erie County.
- b. In addition to these newer facilities, Cornell and CCE have several food enterprise development and entrepreneurship programs that are available to WNY. Niagara County CCE operates the WNY Food Incubator which includes a commercial kitchen and offers business support. The Center of Excellence for Food and Agriculture at Cornell AgriTech works across NYS with entrepreneurs and start-ups to launch and commercialize products and grow existing agriculture-related businesses. The Cornell Food Venture Center, located in Geneva, NY, just east of the WNY region, provides comprehensive assistance to new and established food entrepreneurs.
- c. We have identified 18 dairy processing companies in the region, ranging from small artisanal producers of cheese, ice cream, and other products to large corporations producing in excess of \$100 million annually in processed dairy products. Some of these are shown on this map. There continues to be a slow expansion of on-farm or micro-dairy processors as a means of increasing the supply of local dairy products and the profitability of dairy farming.

6 For more on USDA programs see <https://www.usda.gov/meat>

⑥ During the project period, strong interest emerged among food distributors, hubs, and electronic aggregators to identify and implement ways to improve the efficiency of logistics for aggregation and distribution of local foods. This would reduce redundancy, cost, and environmental footprint, while improving service to both farmers and buyers. Several businesses participating in the infrastructure Work Group are engaged in discussions about how to move this forward, a conversation that overlaps with plans to pilot and test the creation of “sub-hubs” as a means of increasing access to larger markets for smaller or more geographically isolated farms.

⑦ The issue of labor has continually been identified as a concern and presented from several perspectives.

a. Most businesses across the food system appear to be having difficulties finding enough employees to meet the needs of the business. We heard this from food processors, food service managers, farmers, retailers, distributors, and more. This is in part attributable to COVID-19 and is happening across the country. However, as the effects of the pandemic recede, labor issues persist as people seek better working conditions and livable wages.

b. NYS law requires a minimum wage of \$15 (or progressive increases to \$15 depending on industry and location within the state). Farmworker wage requirements in NYS are \$13.20 per hour and overtime is paid after 60 hours a week, with plans to lower the threshold to 40 hours. Farmworker wages are considerably lower in nearby Pennsylvania and overtime pay is not required (however seasonal farm workers are limited to 48 hours a week⁷). As a result, products from Pennsylvania can be sold cheaper than NYS products. Pointed out by farmers, distributors, and retailers, this dynamic demonstrates the importance of reinforcing “NYS Grown” and its continued use in state procurement policy such as Nourish NY. This approach also supports more livable wages among food and farm workers in NY.

7 <https://www.farmworkerjustice.org/pennsylvania/>

c. Livable wage jobs are critical for food security, overall health, and quality of life. Going a step further by providing career opportunities and pathways for WNY residents would contribute to wealth creation and long-term food security. Most of the sizable companies in the food system we spoke to were very receptive to discussing career opportunities and pathways for BIPOC and other residents. Given the workforce challenges they are experiencing, this would be an opportune time to initiate or expand such programs.



A close-up photograph of a hand holding a stalk of wheat. The background is a vast field of wheat under a bright, hazy sky. The overall color palette is warm and golden, suggesting a sunrise or sunset. The text is overlaid in the center of the image.

**MARKETS,
INFRASTRUCTURE,
AND SUPPLY CHAIN**

RECOMMENDATIONS

Given the wide range of products produced and the diversity in scale of producers in the region, strengthening the supply chain will need to be approached in a variety of ways and market channels. There is opportunity in the further development of good food value chains that take advantage of demand from food service providers at anchor institutions such as universities, schools, and hospitals, which will be more appropriate for midsize producers and those that wish to grow their operations, as well as for co-ops and food hubs that aggregate from multiple farms. Market incentives such as the 30% NYS Initiative, Nourish NY, and efforts to modify state procurement policy have been and will continue to be an important factor in market development and procurement at public institutions.

MARKETS & BUYERS

There is also a need and an opportunity to invest in enterprises and distribution programs that foster greater food sovereignty and community-based economic development. This is especially true in urban communities of color and in rural communities that have limited access to grocery stores. Products that are produced locally and regionally, by BIPOC-owned farms and businesses, or that contribute to greenhouse gas reduction are of increasing value to buyers.

The pull of the market is essential. However, it is not enough. To reach the social and economic goals that underpin a resilient and equitable food system there will need to be investment into the development of value chains from production to processing, distribution, retail, and other points of sale, as well as technical assistance by public and private sources.

① **Significantly increase values-based procurement, including local, regional, and equitable food purchasing by anchor institutions,** such as higher education, hospitals and health care, public-schools, and others in the region.

a. Increasing values-based procurement of food by institutions will require leadership, collaboration, capacity-building, and time. However, doing so will increase the market and wealth creation opportunities for local and regional producers, BIPOC producers, and potentially urban farms and food businesses. NYSAWG should work directly with the Markets and Buyers Work Group to establish a community of practice (CoP) that will provide long-term continuity to programs and partnerships that advance values-based institutional procurement. The CoP should be made up of food service and procurement staff at both public and private universities, colleges, hospitals and health care, along with regional suppliers, food processors, CCE, and other organizations. It will serve as a community of peers seeking to learn and foster change, provide technical support, and promote connections across the good food value chain.

- i. NYSAWG, the Work Group, and additional organizations (for example, the procurement sub-group of the Food Policy Council of Buffalo & Erie County) should design a CoP that will best support current and emerging values-based procurement. They will need to determine if the CoP would operate as part of NYSAWG or become a long-term project of one of the Work Group organizations. It will be important to leverage the significant knowledge and capacity at CCE Harvest NY in the design and implementation of the CoP. The experience of other procurement networks and CoPs should be sought during the design process, including Farm to Institution New England (FINE) and Michigan Farm to Institution Network.
- ii. Base funding should be provided for the CoP formation and at least the first two years of operations. NYSAWG should work directly with the CoP to identify and secure additional long-term funding support from state and federal sources as well as from nationally focused foundations.
- iii. NYSAWG and the CoP should lift up best practices, lessons learned by those inside and outside of the region, and build capacity through convening, trainings, and other means. Existing examples include:
 - The University of Rochester has been able to purchase 61% of its food through regional sourcing working with Harvest Table Culinary Group as their food service partner. Cameron Schauf, recently retired director of UR's Campus Dining Services has instructional videos and other tools to assist in creating training materials.
 - Buffalo Public Schools has a very successful farm-to-school program that offers many lessons and supply connections that would be valuable for others.
 - Headwater Food Hub and other regional distributors have extensive experience on the supply side.

- iv. Provide assistance and models to institutions who wish to increase values-based purchasing through the CoP's network of resource people and operating models of procurement. Among others, these models include:
 - CCE Harvest NY
 - The Procurement sub-group of the Food Policy Council of Buffalo and Erie County
 - Food for the Spirit
 - Good Food Buffalo Coalition
 - Markets and Buyers Work Group
 - The Buffalo Niagara Medical Campus
 - Buffalo Purchasing Initiative
- b. The Markets and Buyers Work Group and the CoP should lead outreach to farmers and suppliers who are aware of the market opportunity and make other stakeholders aware of the regional economic multiplier potential of the institutional market channel. To reach growers, the team can work with the farmer Work Group, CCE, NYSAWG's Farmers Market Network, and others.
 - i. It is important to note that prices paid to farmers by food service accounts are sufficient for mid-scale and larger farms but are often too low for smaller farms. Changes in NYS procurement policy, requiring food service management companies to procure locally and/or equitably produced foods, and culinary creativity approaches (such as managing portion size) would all help expand this opportunity to smaller and historically disadvantaged farmers and suppliers.
- c. NYSAWG and the CoP should leverage the work of CCE Harvest NY and their successful farm-to-school programming in selected parts of the region to ensure that more school districts across the nine-county region have the information and support needed to launch similar programs.

- i. The NYS 30% Initiative provides a financial incentive for these districts to start and grow farm-to-school programs, and CCE has a network of Farm-to-School Coordinators. Buffalo Public Schools can serve as a model to other districts via their relationships with suppliers like Headwaters, Providence Farm Collective, Eden Valley Growers, and others that can also supply other districts.
 - ii. School districts in the region should expand purchasing from BIPOC farmers and food businesses in the region. Organizations like Harvest NY, Providence Farm Collective, and Food for the Spirit are working with Buffalo Public Schools and would be instrumental in reaching out and assisting other school districts.
- d. Regional funders should leverage the success of Food for the Spirit’s collective marketing initiative with Genesee Valley Black Farmers by building their capacity to connect BIPOC farmers with institutional markets, marketing, and other networks of support locally and statewide. BIPOC farmers face unique challenges in farming and in the marketplace. With technical and networking support of Food for the Spirit’s collective marketing initiative, they will be better positioned to access the growing market for values-driven purchasing.



- e. NYSAWG and the Markets and Buyers Work Group should further investigate the market and feasibility for regional scale processing in WNY and monitor progress on innovative pilot efforts that are underway. Headwater Food Hub in Rochester is part of one such partnership, processing IQF produce and providing healthy NYS grown food to public schools in the region and expanding markets beyond the growing season. Pilot efforts like this are striving to develop regional food processing pathways which provide minimally processed products (e.g., IQF or chop and pack) at the scale, convenience, and price point needed by institutional food service and retail market channels. Other models that may be instructive include Michigan Farm to Freezer and the Western MA Food Processing Center. Based on the findings of the investigations and pilots, regional funders should support further development of these pathways and partnerships with grants and favorable investments.

- f. Producers who sell or wish to sell products into institutional market channels should be supported by organizations like CCE, American Farmland Trust (AFT), and other farm-focused groups to implement regenerative production practices that build soil quality, reduce greenhouse gas emissions, and are verified and certified. Support should include training, technical assistance, and grants (federal, state and philanthropic) to offset on-farm costs.⁸ NYSAWG and the Work Groups should work with CCE, AFT, and other technical support organizations to ensure they are active in WNY with farms of every size and scale. Additional support needed by these WNY organizations should be considered by regional funders and state agencies.

8 NYS has recently passed climate legislation (see Recommendation II in this section) which will most likely require state and other institutions to reduce their climate impacts, perhaps as early as 2023. Some, such as SUNY Buffalo have already set goals (set a goal of 50% reduction of carbon emissions in the food system) and are reporting on them publicly. Agricultural production practices account for a large portion of the climate impact of food supply chain, however distribution is a much smaller portion. Therefore, reducing climate impact through food procurement will be most effective, and more attractive to institutions, when procurement of local and regional food is combined with the use of regenerative production practices.

2 Identify local, regional, and state-level policies that hamper or enhance values-based food procurement by institutions, and work to secure needed policy changes.

- a. NYSAWG—with support from the RC and the Markets and Buyers Work Group—should request that NY Ag and Markets document the impact Nourish NY has had on WNY food, farm producers, and businesses. This information should then be used to encourage investment by regional economic development organizations into scale-appropriate distribution and processing infrastructure. At the same time, documentation of the impact should also be used by NYSAWG and the various Work Groups to inform producers and other food businesses of this potential financial opportunity.
- b. The RC and NYSAWG should support existing advocacy efforts of the Good Food Buffalo Coalition and NYC Good Food Purchasing Program Campaign (led by Community Food Advocates) to pass the Good Food NY Bill. If adopted, this legislation will amend NYS Municipal law 103 to extend beyond “lowest responsible bidder” in public food procurement and instead promote the values of transparency, racial equity, local economies (geographic preference), environmental sustainability, nutrition, valued workforce, and animal welfare.
- c. NYSAWG, the RC, and the Work Groups should engage with the Climate Action Council to provide input to the draft framework during the comment period, and seek to leverage the programs and investments made by the state when implementation begins in 2023 and beyond.⁹

⁹ The council has developed a draft scoping plan which serves as a framework for how the state will meet the goals set in the act. Among the many climate-focused strategies in the draft plan, it includes Bolstering of Local Agricultural Economies by expanding current programs including procurement programs, education and technical assistance for diverse farm operations (BIPOC, veteran, beginning farmers, etc.) and generational transfer and development of new agricultural products. (Draft Framework: page 233 <https://climate.ny.gov/Our-Climate-Act/Draft-Scoping-Plan>).

3 Increase community food sovereignty and equitable access to fresh, healthy, locally produced foods through alternative retail options.

“Alternative” refers to retail options other than chain grocery stores (with a history of moving out of lower income areas) and includes: cooperatives, farm stops, e-commerce, and other models.

Appendix K provides a view of alternative retail models and their potential impact on access, equity, and food sovereignty.

Note: Other dimensions of our food sovereignty recommendations are discussed in the Access, Equity, and Food Sovereignty recommendations.

- a. NYSAWG and the RC should utilize their networks and influence to encourage business opportunities for community members in alternative retail options. A first step is providing technical and financial support to existing enterprises, such as the African Heritage Food Co-op in Buffalo’s Fruit Belt neighborhood. Additionally, the numerous business incubators, technical assistance providers, and community and economic development entities should be engaged and coordinated through a regional lens to support alternative retail options and other food enterprises.¹¹
- b. Regional funders should provide support for greater coordination and networking among organizations operating mobile markets in WNY to coordinate sourcing and delivery, cover all communities, reduce redundancies in operations, and engage the community so more residents utilize this option.
 - i. UB School of Public Health and Health Professions (UBSPHHP) convened the Mobile Market Summit in 2022 and has also launched a mobile market network in the region. The UB team, in partnership with the Niagara County CCE and other mobile markets, should be supported to promote greater coordination in sourcing, delivery, coverage, operations, and engagement.

- ii. The Market Ambassadors programs should be expanded and replicated with funds provided for honorariums and capacity building. Market Ambassadors are community members enrolled to do outreach in their own community, help residents access and use the market, help customers use SNAP and WIC, provide incentives at the market, and more. It is an approach that has been used effectively by **Foodlink's Curbside Markets**.
- iii. To foster better point-of-sale technology and communications between vendors and customers, NYSAWG should work with the mobile markets in the region and the UBSPHHP to address this need.
- c. NYSAWG should work with the UB Food Lab (through their focus on local and regional planning and policy) to engage city governments in WNY to explore investing in, establishing, and/or operating farmers markets in underserved communities. Cooperation and support from a city is instrumental to the viability of farmers markets in low-income neighborhoods and can make healthy food more affordable and accessible while providing business opportunities for urban farmers and other food entrepreneurs.

Instructive models include city-run markets in Montreal, the partnership model in New Orleans, and Green Market in NYC.

- d. The Farm Stop model stands out as combining the best of a farmers market and a grocery store. Farm Stops are designed to both meet community needs and provide farmers a respectable price for their products. Among the seven independent Farm Stops, some provide certified kitchens for community and producer use, offer on-line ordering and delivery, and accept SNAP and incentives.

Instructive examples include Random Harvest in Craryville, NY (Hudson Valley) and Argus Farm Stop in Ann Arbor MI. We recommend NYSAWG lead efforts to educate community groups about this model, host existing farm stop businesses for educational webinars, and determine how the model can be adapted for urban and rural food insecure communities.

④ **Assist local and regional food distributors in shifting emphasis to local capacity building and food sovereignty.** At its most basic level, this involves increasing the capacity of smaller, grass-roots organizations and businesses working to build food sovereignty, while simultaneously encouraging (and perhaps incentivizing) the more established regional food banks to partner with these groups, using their assets and resources to strengthen them.

a. A range of local and regional food distribution programs and business were identified in the assessment and planning phase, including those led by people from underserved urban and rural communities. NYSAWG should convene these groups to discuss their current strategies, prioritize their needs, and explore ways to build their capacity, individually and collectively. Additional research may be needed during this stage.

We suggest the **African Heritage Food Co-op, Buffalo Go Green, Feed Buffalo, Taproot Collective, Massachusetts Avenue Project, Food for the Spirit**, church networks, and more be included in these conversations.

b. Once these community and neighborhood groups have identified their most essential needs and promising strategies, a second meeting should be convened with food distributors, food hubs, and food banks. The outcome would be a plan of action for capacity building and collaboration, with specific funding and investment priorities identified.

Note that the **UB Food Lab** would also be a valuable partner to plan and implement an initial asset mapping and follow-up research on wealth creation.

c. As regional food banks, **FeedMore WNY** and **Foodlink** play an important role in the distribution of emergency food in WNY, yet can also play a larger role in building a more equitable and resilient food system. We recommend accomplishing this by forming mutually beneficial partnerships with community-based organizations, based upon the process outlined above. They should utilize their physical, financial, social, and intellectual capital to support the success of community-based programs and regional food and farm businesses. We recommend these organizations:

- i. Increase purchases from local farmers and suppliers as much as possible. **Nourish NY** funding has made this more financially feasible, and this state-funded program is expected to continue. The food banks have already used this program extensively and should use some of their purchasing power to help establish and grow the limited resources of BIPOC farmers and food businesses.
- ii. Offer their extensive facilities (as much as possible) to limited resource farms and businesses, whether in off-hours or at times when there is excess capacity.
- iii. Assist urban farmers and community-based entrepreneurs in securing vertical growing units, hoop houses, and other season extension processes and production infrastructure for greater food sovereignty and increased economic opportunity.
- iv. Serve as sub-hub or cross-dock facilities, coordinating with food hubs, distributors, and farmer networks.

Additional details about the sub-hub strategy are contained within the infrastructure recommendations.

- v. Work with existing community-based organizations such as the **Taproot Collective**, **Buffalo Go Green**, and others to ramp up community gardening programs, particularly in areas lacking access to healthy foods.



vi. Advance racial equity both internally and externally in programming and partnerships. There are organizations and consultants both in the region and across the country who have expertise and resources to help guide this work. **Food for the Spirit's** accountability efforts should be reviewed as a guide to forming accountable relationships and a model for entering relationships with other individuals and organizations.

INFRASTRUCTURE

Food system infrastructure encompasses a wide range of facilities and technologies that collectively make food more widely available and offer more diverse products to consumers. Examples of infrastructure efforts include:

- Aggregating farm products from multiple farmers, then distributing those to customers and buyers.
- Processing food, whether to increase its shelf life (e.g., freezing, drying) or to add value to the item (e.g., cooking, baking, pickling).

Recently, “electronic infrastructure” has emerged, including on-line marketplaces and various platforms for synchronizing and increasing the efficiency of food distribution.

In many respects, WNY has relatively robust food system infrastructure, including **Upstate Niagara Cooperative** and other milk and dairy co-ops; value-adding dairy processors, such as **Chobani, Rich Products, Goya** and others; and a variety of fruit and vegetable processors who flash-freeze large quantities of produce or make higher value products from potatoes and other staples of the region.

Examples of “homegrown” infrastructure range from **Noblehurst Farms** chocolate milk and cheese products, to **Pittsford Dairy’s** ice cream and milk products, to **Marquart Farms** well-known potato chips. On a somewhat smaller scale, **Wilson Beef Farms** in Canaseraga produces a wide array of “meat sticks” using their own beef, along with local pork and venison, and **Megan and Ryan Burley** are building a small micro-dairy for bottling milk from their pasture-based dairy cows.

The recommendations in this section focus on three critical gaps in infrastructure or infrastructure access.

- 1 **Expand meat processing capacity throughout Western New York through strategic investments in local, farmer-driven models** like Alliance Farm Butchery in Holland, New York. During the project period, at least three new meat processing facilities emerged or made progress towards becoming operational: Burley Brothers (near Attica) completed construction of its facility and began processing animals in May; IQRA Meat Packaging reopened in the former Eklund Meat Packing facility in Stamford, NY; and the Alliance Farm Butchery completed its 20-C commercial kitchen and began work on its own USDA slaughter facility.
 - a. Currently, regional funders are in discussions with AFB to fund the remaining capital they need to complete the USDA slaughter facility, the essential complement to the 20-C kitchen. This investment should be completed quickly to enable AFB to become fully operational, as this will help overcome a critical bottleneck, enabling as many as two dozen small-scale meat producers to process their animals, increasing the supply of healthy local foods.
 - b. As AFB gains operational experience, a plan to replicate this lower-cost, farmer-based model for meat processing should be developed in concert with AFB, with investment made available to other parts of the region to construct comparable facilities and widely expand desperately needed processing capacity.
 - i. One strong candidate for this is **Gakwi:yo:h Farms** in the Seneca Nation, whose small herd of cattle and buffalo is without a reliable processing option.

c. The partnership between Headwater Food Hub and Butter Meat Co. to build a reliable supply of regionally sourced, relatively affordable ground beef from cull dairy cows should be assisted through coordination with emerging institutional procurement efforts, led by the Markets and Buyers Work Group. This enterprise will not only enable increased procurement and use of healthy, regionally sourced meats by larger institutions, but will also provide another source of income to the region's many dairy farms.

d. As described in more detail in the Organizational Infrastructure section, a grant writer, familiar with both federal and state funding sources, should be hired to help businesses like this put forward competitive applications to USDA and others.

② Increase market access for small to midsize farmers, and increase consumer access to local food by pilot testing and then developing a network of sub-hubs that link producers with food hubs, food distributors, e-commerce platforms, and end buyers. The sub-hub model can and likely will vary in its details, adapted to the needs and goals of the farmers, distributors, and communities involved. A description of some of these potential models is included in Appendix I and provides additional information on the specific steps recommended below.

a. Working with both the Infrastructure and Farmer Work Groups, select two to three pilot sub-hubs for investment in 2022/2023. These will test the effectiveness of this model while increasing farmer access to larger and more varied markets than are currently available to them. Particular attention should be paid to the location of the sub-hubs to ensure relatively easy access to the largest number of farmers likely to utilize them. We suggest that Brigiotta's Produce, which is moving forward with plans to build out a sub-hub intended to increase market access for small farmers, should be among the pilot efforts supported.

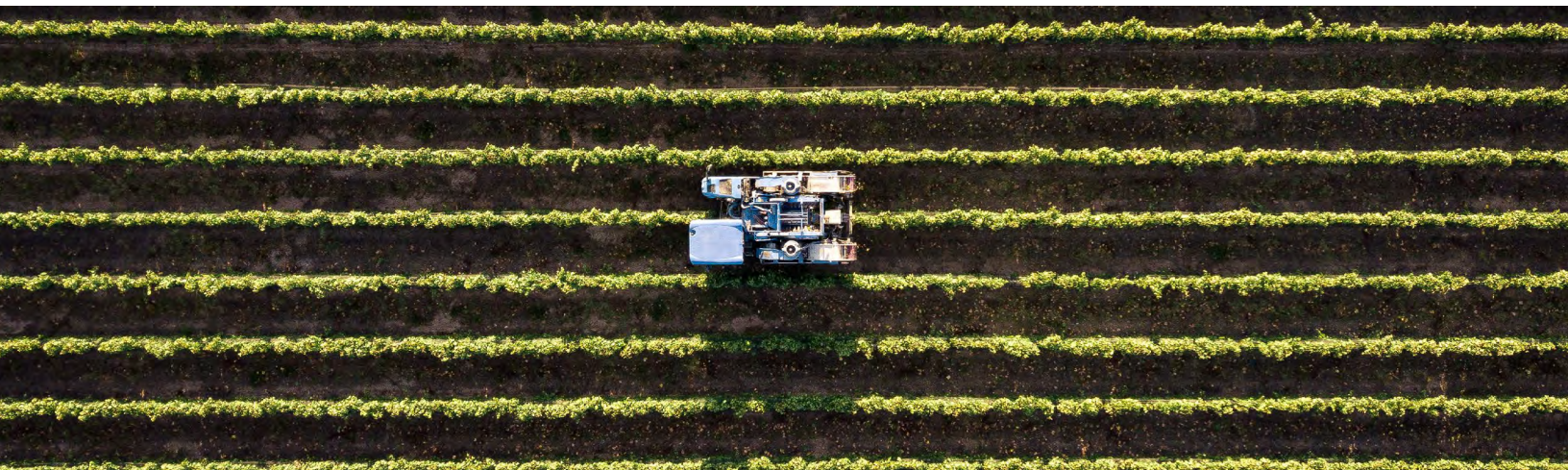
- b. Improve the reach and efficiency of current regional food system delivery through planning and logistical coordination among key aggregators and distributors in the region. At a minimum, these are likely to include Produce Peddlers, Headwater Food Hub, Eden Valley Growers, FreshFix, and Brigiotta's. All of these organizations have shown interest in improving efficiency and reducing redundancies in the regional supply chain. While sub-hubs may play a role in this, we also recommend that Headwater Food Hub and Produce Peddlers spearhead integrating logistics among distributors, including investment in developing a system of logistics and delivery synchronization. Farm Fare should be engaged to help develop this system, using the approach they call "Economies of Collaboration."
- c. Working with the Massachusetts Avenue Project, the Greater Buffalo Urban Growers Network, the Taproot Collective in Rochester, and the Access, Equity, and Sovereignty Work Group, invest in at least one sub-hub facility in an underserved community of Buffalo or Rochester with the goal of increasing access to healthy foods while also providing additional market opportunities for urban and peri-urban farms. FeedMore is interested in supporting the development of sub-hubs, in part through use of their facilities as a 'cross dock' for producers and small buyers. The recently formed regional mobile market network may also be consulted in this process.
- d. In 2024, conduct an evaluation of the sub-hubs, examining their effectiveness in terms of farmer participation, pricing received by farmers, increases in efficiency for distributors and/or buyers, improvements in food access in underserved communities, and other relevant criteria.
- e. Depending upon the results of this evaluation, explore investment in additional sub-hubs in other underserved parts of WNY.

- 3 Increase access to commercial kitchen processing opportunities for aspiring food entrepreneurs and for groups focused on sovereignty by partnering with and expanding the capacity of existing commercial and shared-use kitchens.
 - a. Map the current food processing facilities, their locations, capacity, and ability to work with entrepreneurs or community members across the WNY region. An initial inventory and map of processing facilities has been developed through the Infrastructure Work Group, the UB Food Lab, and the consulting team.
 - b. Help link communities with current and emerging community kitchens, such as the newly completed kitchen at Matt Urban Center, to help increase access to healthy local foods. This linking may take the form of introductory meetings and tours of the facilities, followed by development of schedules of use for community partners. Note that the Massachusetts Avenue Project, which has a kitchen and substantial experience utilizing it for community benefit, provides a model for consideration. Their assistance should be sought to help design any broader strategy to build out such capacity. Additionally, partnerships with the Gowanda Food and Agricultural Center (currently under development) should be explored. This work should be a collaboration between the AES and Infrastructure Work Groups, supported by NYSAWG staff.
 - c. Explore potential for existing community kitchens to also serve as sub-hubs for aggregation and some form of retail in under-resourced communities. One example of this that could be expanded is Brigiotta's retail facility in Jamestown, which also includes a small commercial kitchen.
 - d. Targeted investment will be needed to help build or expand food processing facilities for improved community food access and the incubation of value-added food businesses.

④ Expand processing and value-adding options for dairy farmers, potentially through investment in small processing facilities—micro-dairies or creameries—that add value and enable direct sales of local milk. Dairy farms represent the largest part of the agricultural economy in WNY, both in terms of acreage and revenue. Additionally, the presence of Upstate Niagara Cooperative provides farmers with a regional alternative to larger national dairy co-ops while also being a substantial employer and economic driver itself.

- a. While most farmers will continue to sell their milk to Upstate or other co-ops, a growing number are considering building creameries or micro-dairies on their own farms in order to secure better prices for their milk and sell directly to consumers. These emerging micro-dairies will need business planning and market analysis services in order to assess potential demand, product mix (cheese, yogurt, bottled milk, etc.), market competition, price points for their products, and other critical business decisions. We suggest working with Megan and Ryan Burley, whose micro-dairy is scheduled for completion in the fall, and Katie Carpenter, whose small dairy has been working to develop value-added products to further grow this area.
- b. Micro-dairies or other innovative milk processing businesses that demonstrate a strong business case should be encouraged and assisted through direct investment, whether through crowdfunding or via the regional Farm and Food Investment Fund.
- c. Efforts to grow and diversify the base of local food consumers, described in the Farmer and Producer recommendations, should also include the milk, cheese, yogurt, and other products that emerge from these dairies, as well as other more established dairies in the region.

- 5 Work with existing BIPOC-owned businesses and BIPOC-run organizations to identify and implement opportunities for investment that both supports their enterprises and, more specifically, builds opportunities for expanded BIPOC ownership within the WNY food system. This process can begin by convening current BIPOC food system entrepreneurs including Urban Fruits & Veggies, African Heritage Food Co-op, Gakwi:yo:h Farms, Moss Fresh Fruits & Vegetables, as well as key BIPOC-led organizations, such as Food for the Spirit, the Taproot Collective, the Northeast Farmers of Color Land Trust, and others.
- a. This process should be led or at least assisted by the Food and Racial Equity Council, described in the Organizational Infrastructure, beginning with an assessment of assets and gaps in food system BIPOC ownership and leadership. The UB Food Lab may be able to assist in this effort.
 - b. Building on the assessment of assets and gaps, identify additional opportunities for investment, including both grants and loans, that meet the needs and capacity of these businesses and organizations.
 - c. Initiate long-term investment, initially from the Food and Farm Fund, with the goal of dramatically expanding BIPOC ownership and leadership in the food system of WNY.
 - d. Essential technical assistance and capacity building should accompany grants and loans to BIPOC-run businesses and organizations to increase their effectiveness and chances of success.





FINANCE & INVESTMENT

FINANCING

FINDINGS

Western New York (WNY) was defined in our study as encompassing nine counties: Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Monroe, Niagara, Orleans, and Wyoming. According to data from ESRI's Business Analysis, the current population of the region is 2,296,482 with a median household income of \$59,659. The financial assets of the region, as of 2020, were as follows:

	\$ Millions
Checking, Savings, Money Market Accounts, and CDs	\$14,606
Stocks, Bonds, and Mutual Funds	\$20,574
Other Financial Assets	\$7,133
Retirement Plans	\$80,522
Whole Life Insurance Plans	\$9,711
	\$132,606

The region thus has more than \$132 billion in investable capital. Nearly all of it, however, is in globally traded securities and tied up in pension funds, mutual funds, and insurance plans. Very little touches WNY businesses, including food and farming businesses and projects (FFBPs). Changing this allocation of capital in the region—which for too long has been accepted as an immutable fact—is the key to bringing more finance and investment into FFBPs.

There’s a growing movement in the United States for shifting capital “from Wall Street to Main Street” that’s rooted in a recognition of how important local businesses are for regional prosperity. Roughly 60-80% of U.S. jobs are in locally owned enterprises (depending on how “local” is defined). This percentage is higher in regions with large rural components like WNY. Most of these businesses are competitive, profitable, and well-managed. Compared to global businesses operating in the region, these businesses generate (per job) a significantly higher economic multiplier effect. Dozens of studies have shown that a diversity of healthy local businesses boosts equity, resilience, entrepreneurship, tourism, and social stability.

And yet residents in WNY, as is the case across the United States, are systematically overinvesting in global companies and underinvesting in local business. This can be understood as an enormous misallocation of capital—and also as an enormous opportunity. Movement of even 1% of this capital would make more than \$1 billion newly available to starting and expanding FFBPs. This scale of investment could help underwrite many of the recommendations of this initiative.



This point has been largely overlooked thus far. Our review of eight prior studies examining finance and investment in the region found almost no consideration of the potential role of local grassroots capital investment. Each of these studies contained myriad ideas for expanding local FFBPs. Many made astute policy recommendations that could help achieve these goals, such as changes in procurement, regulations, zoning, and tax. Creative programs were put forward around smart growth, brownfields reclamation, complete streets, land banks, producer cooperatives, and infrastructure. Yet when it came to how to pay for these ideas, the authors generally offered long lists of federal and state programs—grants, loans, loan guarantees. They also envisioned larger asks from regional foundations and philanthropists. All reports lack understanding of the gaps in the private capital markets and opportunities for filling them. As one interviewee put it, “food and finance people do not coordinate very much.”

Our principal finding, therefore, is that the WNY region has barely begun to take advantage of expanding opportunities for tapping grassroots investors for FFBPs.

One telling indicator of this finding is investment crowdfunding. Since investment crowdfunding became available in 2016, nationwide, more than a million grassroots investors have put more than a billion dollars into 5,000 local companies. The average successful company has raised more than \$300,000, and the average investor has committed \$800. Our analysis of crowdfunding offerings found that 10-20% of these offerings are for FFBPs, and yet only one had taken advantage of this new tool.

See Appendix E for our full analysis.

Underlying this top-line observation, however, is a more nuanced picture of the financial ecosystem in WNY. Through interviews, readings, discussions, and webinars, the Finance Working Group (WG) put together an analysis of the ecosystem’s strengths, weaknesses, opportunities, and threats (SWOT).

A complete presentation of findings can be found in Appendix D.

Additionally, we created extensive resource directories on the project's website to help WNY FFBPs more easily find capital and business support (to strengthen their case for obtaining capital). Here, we summarize the highlights, including a one-page overview of our SWOT findings:

The region has strengths in the form of many state subsidies for FFBPs, numerous banks and credit unions, several prominent community development financial institutions (which support low-income and BIPOC entrepreneurs), countless foundations committed to FFBPs, farm-support entities like Farm Credit East, and various relevant microloan programs. For FFBP entrepreneurs who are

experienced and savvy, myriad finance opportunities—grants, loans, loan guarantees, and equity investments—are available. Moreover, there are many entities in the region that are ready to help FFBPs secure capital, and they provide support through mentorship programs, women's business support programs, incubators, accelerators, maker spaces, and commercial kitchens.

The region also has strong collaborative networks. Many existing collaboratives among counties, local governments, foundations, and businesses in the region could generate substantial new capital for FFBPs. And indeed, funding for our work—and follow-up work—came from one such collaborative.

Finally, there is one bright spot in the universe of grassroots capital.

Common Owner is one of 80 federally licensed investment-crowdfunding portals and is based in WNY. Common Owner focuses primarily on real estate purchases, but other food businesses with a physical footprint—like cafes, restaurants, breweries, and urban farms—could qualify for its offerings. The portal has hired a consulting company, **Urban Vantage**, to find potential BIPOC clients on the East Side of Buffalo. (The other federally licensed investment crowdfunding portals also can be used by WNY businesses and investors.)

However, the regional finance ecosystem has significant weaknesses. Many observers describe the business environment in WNY as traditional, stodgy, conservative, and risk averse. This means more limited capital availability for FFBCPs in rural areas and inner-city neighborhoods, because FFBCPs are not considered “high growth.” For example, despite significant evidence to the contrary, investment crowdfunding is viewed as a detriment to businesses raising capital from mainstream markets.

Many successful, well-functioning food businesses are not getting needed growth capital. Put another way, the platitude that “all good businesses will find capital” is simply untrue. The chance of any local business getting support from angel or VC investors is well below one in a hundred (and probably lower still for FFBCPs). Small start-up FFBCPs and high-growth FFBCPs may fare somewhat better, but existing FFBCPs patiently seeking growth capital have a very hard time finding it. Additionally, BIPOC entrepreneurs, whether they are based in urban food deserts or Native American reservations, lack the assets, credit histories, and social networks that are essential for small businesses to raise capital.

The overall viability of regional farming is also a concerning gap. With farmers in the region struggling to break even, they are under increasing pressure to sell their farms to developers, investors, or larger farmers. But where will the food to feed people moving into the region come from? A critical mass of farming is essential for a viable local food system, and therefore, new ways must be found to protect farmland—including new forms of local investment in land.

These gaps also suggest opportunities. Significantly more capital can be injected into the ecosystem through new food-and-farm focused investment funds, municipal bond raises, and tax credits; through stronger business-support systems; and through the promotion of community ownership models like worker cooperatives and community land trusts.

Anchor institutions can be mobilized to accelerate deployment of these ideas (as they have in Cleveland and elsewhere).

Threats also abound. Like many other areas of the United States, infrastructure is crumbling, banks are consolidating, and most business subsidies are targeting the attraction of outside businesses (not the nurturing of local FFBPs). New York State's aggressive securities regulatory rules (among the most stringent in the country) also offer unique challenges. Efforts to make grassroots investment easier, for example, are likely to run into resistance from securities regulators.





FINANCE & INVESTMENT

RECOMMENDATIONS

RECOMMENDATIONS

For the past year, the Food Finance Work Group has been laying the foundation for further action. The Food Future WNY website now provides extensive resources for food and farming businesses and projects (FFBPs): sources of capital available in the region, business support services that can increase the ability of FFBPs to attract capital, and emerging grassroots finance tools. Additionally, a space was created on the site to list FFBPs currently looking for capital, whether through investment crowdfunding, bulk pre-purchasing deals, or donation crowdfunding. And through internal discussions, the Food Finance Work Group developed plans for a regional fund for FFBPs and simple, low-cost policies that could accelerate the availability of capital for FFBPs.

① **Project staff should continue to build out the resources the Food Finance Working Group has posted on the FFWNY website.** Over time, this should be the go-to destination for food and farming businesses and projects (FFBPs) looking for information and contacts for accessing capital. This information should be shaped to be especially helpful for women and BIPOC entrepreneurs who have historically had difficulty accessing the traditional entrepreneurship ecosystem. Specifically, project staff should:

- a. Expand the project website's list of mainstream financial options in the region available for FFBPs, including banks, credit unions, CDFIs, angel investors, venture investors, and revolving loan funds. Also, include grant opportunities available to businesses from foundations, local governments, county governments, the state of New York, and federal agencies, with references to experts and successful applicants in the region to help other potential applicants.
- b. Expand the project website's list of technical assistance (TA) mechanisms in the region available to FFBPs, including courses, competitions, mentors, communities of practice, incubators, accelerators, and co-working spaces. TA providers that specialize in certain FFBPs—such as meat processing or farm start-ups—should be identified as well.
- c. Deepen the project website's resources that can help connect FFBPs with grassroots investors. This will include investment clubs, Slow Money chapters, local investment funds, and investment crowdfunding portals. It also should include information about land trusts, cooperatives, social enterprises, and other structures that can expand local ownership opportunities for FFBPs.
- d. Improve the organization of these resources online so that it is easy for a newcomer to find the right resources quickly.

- e. Develop representatives throughout the region (e.g., in Cornell Extension) who are already working with FFBPs, make sure they are aware of our expanding resources, and encourage them to connect their clients to these resources. These representatives should, in turn, help identify gaps in the resources that need to be filled. If it becomes clear that some FFBPs have inadequate representation, mobilize project staff to reach them.
- f. Develop a regular webinar series featuring FFBPs who have successfully raised capital and create a library of these webinars to inform and inspire other FFBPs.

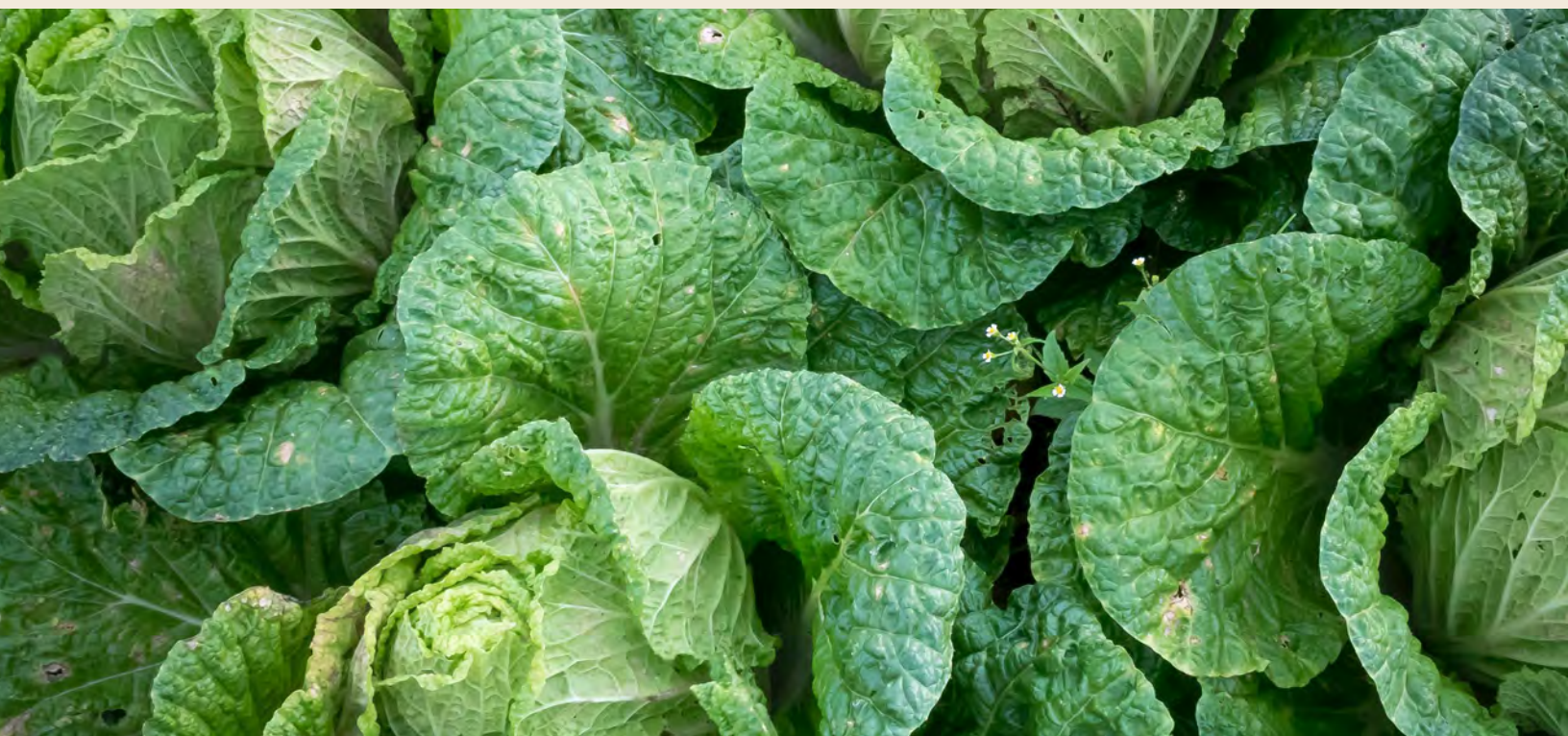
② **Create a new regional fund that invests in FFBPs.** Because a fund can provide investors with diversification, liquidity, and professional management, it is a more attractive way for residents to invest in FFBPs. It also can increase the ability of women and BIPOC entrepreneurs to find needed capital for their FFBPs. The Finance Working Group's review of other Food and Farm Business funds suggests the following features:

- a. Focus finance on FFBPs in the region that meet one or more of the following criteria: businesses that cannot easily find financing from existing sources; businesses that provide vital linkages to other local FFBPs (e.g., slaughtering, distribution, warehousing, packaging, or marketing); businesses that are committed to achieving, in addition to profitability, high social, community, and environmental standards; businesses that are run by and meet the needs of underserved communities in the region; businesses that demonstrate models, technologies, or structures that, if replicated, could significantly improve regional food self-reliance; businesses that enable farmers to modernize their equipment and practices, while at the same time enhancing their sustainability; and businesses that connect and benefit both urban and rural parts of the region. These criteria should be continually updated if other sources of finance for FFBPs become available in the region.

- b. Our recommendation to create “a fund” is not meant to discourage the creation of multiple pools of capital operating under the same roof. Given the different capital needs of FFBCPs in the region, it might make sense to set up one pool offering low or no-interest loans for start-ups, another pool for purchasing farmland, and still another pool making equity investments in high-growth companies. Some pools might have a high expectation for a positive private Return on Investment (ROI) while others might just focus on a high social ROI.
- c. Allow both accredited and nonaccredited investors to participate.¹⁰
- d. Like most funds, this fund should sit in an independent corporate structure (e.g., an LLC) and have investment decisions made by a board-level investment committee. Supplementing these decisions would be neighborhood committees in the region, set up in consultation with the RC along with the other project Working Groups, that verify and ratify the need for the proposed business. These neighborhood committees should bring in expertise in the region and the RC, as needed. Community engagement is also a way of ensuring that businesses most needed—perhaps new grocery stores in food deserts—are given funding priority.
- e. To facilitate a quick launch of the fund, begin by outsourcing management of the fund, perhaps to a mission-aligned organization like the Fair Food Network.
- f. Develop multiple tranches for investors, designed so that foundations and other high net-worth investors take a higher risk position. This will increase the attractiveness of the fund for grassroots investors, who will be in a stronger position to not lose money.

¹⁰ Accredited investors are individuals who earn more than \$200,000 per year, couples who earn more than \$300,000 per year, or households with more than \$1 million in wealth (excluding their houses). Roughly 5% of the American public is accredited. The remaining 95% are unaccredited investors—sometimes also called grassroots or retail investors.

- g. Raise, to the greatest extent possible, grants for the fund to cover technical assistance costs and seed any other operation elements that are unlikely to affect cash flow. For example, a fund for start-ups, where more companies are likely to fail, might be underwritten by foundations.
- h. To start building the fund, form an advisory committee populated with high-level, widely respected regional leaders. Develop partnerships with anchor institutions in the region (universities, government agencies, sports teams, hospitals) that will encourage their employees to become investors in the fund.
- i. Since formation of a fund like this takes time, encouraging interested philanthropists and foundations in the region to create ad-hoc pools of capital to support FFBPs and related community-based organizations with urgent capital needs is key. Alternatively, funders can use existing structures where relevant, such as the Black Farmer Fund (which serves the entire Northeast) or the Fair Food Fund (which currently serves Michigan). These pools should combine grant, mission-related investments, and program-related investments.



- ③ **Expand the local investment marketplace in the region for FFBPs that has been set up already on the FFWNY website, and make special efforts to recruit BIPOC businesses to participate.** This means putting effort into preparing both FFBPs and additional investors for investment opportunities on both sides. Recommendations include:
- a. Regularly update the list of FFBPs currently seeking grassroots support through donation crowdfunding, investment crowdfunding, and pre-purchasing on the FFWNY website.
 - b. Create a newsletter linked to the FFWNY website listing investment opportunities in FFBPs as a way of building up a network of grassroots investors in the region. Encourage these subscribers not only to invest in specific FFBPs but also in emerging FFBPs through the **Black Farmer Fund** and the new fund outlined under Recommendation 2.
 - c. Sponsor monthly potluck dinners across the region introducing FFBPs to interested local investors, with special attention to creating these social networks in rural and BIPOC communities. To not run afoul of securities regulations, these events should be focused on relationship-building rather than explicit pitches for investment.

In Port Townsend, Washington, a town of 10,000 people, a comparable social invention has facilitated nearly \$1 million of new investment per year since 2007.
 - d. Consistent with recent changes in SEC law, create online communication channels on the Food Future WNY website for FFBPs interested in investment crowdfunding to have “testing the waters” conversations with local investors.¹¹
 - e. Partner with local and county governments to promote local investor education. Convince them to enact tax credits and other incentives that reward residents for investing in local FFBPs.

¹¹ Until recently, companies interested in crowdfunding were prohibited from having “testing the waters” conversations with potential investors. Under the recently announced Rule 206, such conversations now can proceed in person or online if certain rules are followed.

- f. Draw attention to the resources already on the FFWNY website that explain how local investors can use self-directed IRAs and solo 401ks to open up opportunities for investing in FFBPs with tax-deferred funds.

4 To the extent that the project organizes policy advocacy, encourage policymakers in the region (state, county, and local) to embrace simple, low-cost ideas for accelerating the flow of local capital to FFBPs. Top suggestions include:

- a. Launch (or support) campaigns to educate residents and resident businesses on grassroots investing opportunities (like Title III crowdfunding), and how they can tap their pension funds for these investments through self-directed IRAs and solo 401ks.
- b. Direct local economic development agencies to administer “readiness surveys” for local businesses, especially FFBPs, to ascertain their ability to successfully raise local capital. The score would then lead to a specific to-do list for businesses to improve their readiness.
- c. Each government entity should shift some or all of its banking into community banks to expand community bank lending to local FFBPs. Phoenix and Tucson offer templates on how to do this through the creative use of CDARS.
- d. Create a collaborative of banks in the region to share evaluations of regional FFBPs and streamline the ability of businesses to get loans from them more quickly. Banks and other funds in Santa Fe have considered doing this.
- e. Issue tax-exempt bonds to facilitate all these activities (and those below). The Green Bank in Connecticut recently issued \$25 million worth of baby bonds (with low denominations, purchasable by residents) to finance solar energy expansion.

- f. Create tax credits for local FFB investment. In New Brunswick, Canada, the province provides a 50% tax credit for local investors (every \$1 of investment gets you 50 cents off your taxes). Michigan has a bill to do this as well. While Opportunity Zones give a tiny number of accredited investors an incentive to invest in real estate projects, this kind of tax credit would give every local investor an incentive to invest in every kind of FFB.
- g. Create a new exemption in state securities law that makes it cheaper and easier for communities to create their own FFB funds.
- h. Bring New York's laws (currently prohibiting conversations between FFBCs and potential investors) into alignment with federal laws, which allow these conversations.





ORGANIZATIONAL INFRASTRUCTURE RECOMMENDATIONS

ADDITIONAL RECOMMENDATIONS

ADDITIONAL RECOMMENDATIONS

Organizational Infrastructure to Guide and Manage FFWNY Following the Consultancy Phase.

This final set of recommendations considers who will lead this initiative into the next phase, how decisions will be made, and what role community leaders and stakeholders can and should play through the structures developed during phase one. We provide extensive elaboration and detail below, but in essence we recommend:

- ① **The Regional Advisory Council, renamed the Regional Council (RC), and the five Work Groups should be continued, expanded, supported, and modified to move their primary focus from discussion to action.** These entities, developed during the course of phase one, grounded the initiative in the experience of food system stakeholders and helped facilitate numerous connections across the region that had not previously existed. Their continuation, with suggested adaptations, is critical to ensuring this remains a community-based, bottom-up project.
- ② **NYSAWG, the New York Sustainable Agriculture Working Group, should become the “backbone organization,” with organizational and administrative support from Southern Tier West Regional Development Board.** More explanation of the role of the backbone organization is contained below. In brief, it is the group through which programmatic staffing, administrative and fiscal support, and the details of planning and implementation are coordinated.
- ③ **The development of a new body, the Food and Racial Equity Steering Council, should be undertaken at the beginning of phase two, with 12-18 months allotted to select members, build capacity among participants, and develop operational recommendations related to food and racial equity.** Again, more detail follows, but this body will help ensure that equity, including specifically racial equity, is addressed systematically and productively during phase two and beyond.
- ④ **The Moving Forward Together Funders collaborative should provide sufficient support to enable NYSAWG to effectively coordinate, manage, and staff the core elements of the initiative and carry out the recommendations (or their variants as they emerge) put forth by the consultants.** Specific staffing recommendations are delineated below.

- ⑤ **Development of a shared governance effectively balances the diverse range of perspectives and needs that emerge from the RC and Work Groups with the need to efficiently manage the initiative and implement concrete actions.** We understand that “shared governance” is complex and potentially cumbersome, so we have offered some guidance as to how to develop and utilize this approach.

SPECIFIC RECOMMENDATIONS:

- ① **Continue to embrace, further develop, and utilize the operating principles developed by the RAC and applied across the initiative.**

The principles provide a compass for the initiative and are designed to support equity in all its forms. The current set of principles should be reviewed and revised as needed by the new leadership.

- a. Establish JEDI (Justice, Equity, Diversity, and Inclusion) principles
- b. Focus on systemic change rather than "band aids"
- c. Work towards concrete action
- d. Identify the data you need and use data to inform your plans
- e. Identify policy changes needed
- f. Promote economic development, economic, and food sovereignty

- ② Continue and expand the Regional Advisory Council, to be renamed the Regional Council, as a core structure and means for FFWNY stakeholders to meaningfully implement phase 1 recommendations.

The Regional Council (RC) should shift from primarily an advisory role to a stronger leadership role. Implementation and operational decisions will primarily fall to the board and staff of NYSAWG, which will serve as the “backbone organization” for FFWNY. Working with NYSAWG, the RC will help determine the direction for the project and priorities for funding and investment.

As the primary leadership body, the RC will be critical to ensuring alignment with the project's principles, further prioritization and implementation of strategies, the allocation of resources and evaluation of results and impacts. Several structural changes should be made to support this role:

- a. Expand the number of members from the current level to 25-30 in order to sufficiently represent the region's food system sectors and geographic areas.
- b. Increase representation on the RC from farmers to ensure continued focus on the viability of farms in the region as a foundation for its food system.
- c. Increase representation from food businesses along the regional food supply chain.
- d. Add representation from farm worker and labor organizations (Alliance Agricola is one possibility here).
- e. Ensure continued and expanded representation from food and racial equity leaders on the RC. The deep-rooted nature of systemic racism and its continued impact cannot be overstated.

See recommendation 3: Food and Racial Equity Advisory Council for further guidance on this.

- f. Shift from monthly to bi-monthly or quarterly meetings to help increase participation.
- g. Continue to provide honoraria to RC members.



3 **Establish Food and Racial Equity as an integral part of FFWNY**

Initiative. To advance the initiative’s collective understanding and work on food and racial equity, a racial equity lens must be integrated into the decision-making process from the outset, rather than making recommendations and then evaluating their racial equity impact afterward. This will help achieve the intended outcomes, get the resources needed to do the work, and spur needed long-term changes to institutions and structures.

To most effectively make racial equity an integral part of FFWNY, we recommend:

- a. Making an explicit, stated commitment to using the food and racial equity lens.
- b. Establishing a Food and Racial Equity Steering Committee, composed of effective BIPOC racial justice advocates across and beyond the WNY food system. The FRE Steering Committee will design a process to help guide decisions, ensure diverse representation at all levels of the project, and monitor and evaluate results and impacts, all from a JEDI lens. The FRE Steering Committee should communicate regularly with the RC and include RC members in its ranks as appropriate and feasible.
- c. Once the FRE Steering Committee has been established and organizational policy has been set, it may transition to a formal body such as a Food and Racial Equity Leadership Council that may or may not operate from within the new RC. This council should have decision-making authority on matters related to racial equity, and jointly shared responsibility with the RC and NYSAWG, to help ensure that racial equity is prioritized wherever possible.

- i. With support from the MFT collaborative, the FRE Council should conduct a strategic planning process with food system actors of color, including members of the RC, WGs, and other BIPOC leaders, to help solidify JEDI priorities for FFWNY and the development of a food and racial equity lens. Annual equity audits may also be conducted by the council or completed in partnership with BIPOC-led organizations with that experience and capacity.
 - ii. The Council will co-create, with the RC, an outreach and support plan for underserved communities that develops criteria for funding of racial equity work and specifies the role that community-level collaborations will play in accessing and distributing resources.
- d. Development of collaborative partnerships with organizations in the region and beyond that are already leading in JEDI and Racial Equity, such as the Intertribal Agriculture Council or Buffalo Food Equity Network. This approach would build the capacity of FFWNY as a collaborative initiative intentionally leading food and racial equity work in the region.
- e. Within the funding provided by MFT and other supporters, allocate a dedicated stream of funds devoted to equipping leaders with the skills needed to advance racial equity and inclusion across the FFWNY network.



4 Revise and empower the Work Groups with resources that support the development and implementation of focused work plans with realistic goals.

The Work Groups are the most important structural component in assuring that the initiative continues to be primarily bottom-up and locally rooted rather than top-down and centralized. It is for this reason that we suggest funds be made available to them as described below.

- a. For the first two to three years of phase two, allocate \$25,000 - \$50,000 annually for each Work Group to enable them to act on priority objectives. These funds would be held by NYSAWG, released to the Work Groups as they develop plans and budgets for projects they wish to pursue, with precise details of this process developed by NYSAWG in consultation with the RC and the Work Groups. Examples of appropriate expenditures might include:
 - i. Contracting for research, information gathering, and outreach.
 - ii. Development of educational, marketing, and other materials.
 - iii. Capacity building and technical assistance.
 - iv. Organizing and hosting events, trainings, or summits that further objectives.
 - v. Work Groups will also be encouraged to work together to develop collaborative projects that respond to more complex challenges and opportunities, and to partner with additional groups and businesses as needed to achieve their objectives.
- b. Experienced and knowledgeable staff should be hired and assigned to manage the Work Groups.

See item 7 for specific staffing recommendations.

5 Develop a shared governance approach for FFWNY that supports efficient management of the initiative and implementation of concrete actions, based upon the recommendations provided in this report, as well as priorities that emerge from the RC, Work Groups and other key stakeholders.

As noted, the RC should be positioned as the main leadership body of the initiative, assuring that diverse voices are central to all phases of the project. The RC will work with NYSAWG to set direction and priorities for the project and help prioritize the allocation of resources.

NYSAWG will function as the backbone organization for the FFWNY collaboration, ensuring effective management of the RC and Work Groups and administration of all aspects of the project. Implementation and operational decisions will primarily fall to the NYSAWG board and staff who will need to balance substantive inclusion of diverse food system stakeholders with achieving concrete results across the project. NYSAWG, a 501(c3) affiliate of Southern Tier West, anticipates contracting with STW for administrative and staffing services in support of FFWNY.

- a. The NYSAWG board should have at least one and preferably two people who are also active members of the RC, in order to facilitate strong communication and collaborative decision making.
- b. Future selection of NYSAWG's board, as well as project staff should be guided by the principles of diversity, equity, and inclusion.
- c. Phase 1 findings and recommendations include a number of immediately actionable implementation steps, providing the basis for an action plan for FFWNY.
- d. A system should be put in place to track and monitor progress on goals and objectives as well as results and impacts.

- e. From investigation into a “collective impact” model of decision-making, we recognize that there is a danger that the bulk of the work falls to the backbone organization rather than more broadly shared responsibility. To avoid this, RC members should be selected who are active in food systems work and who expect to be actively involved in the initiative’s work rather than just being advisory.
- f. Strong relationships should be developed among many RAC members during phase one. In order to solidify the regional nature of this initiative and to increase each member’s appreciation for other areas of the food system, regular peer-learning opportunities should be offered, including field trips by the RC to the farms, businesses, and communities of their sister members.

6 Clarify FFWNY’s branding and be proactive in internal and external communications. Success of FFWNY will depend in large part on extensive engagement and collaboration among stakeholders in the region and beyond. As a result, having a clear and understandable identity and consistent messaging will be important. An external facing communications plan should be developed building on the current internal facing plan and implemented beginning in the fall/winter of 2022. The communications plan should seek to increase awareness of and engagement with the initiative and foster changes in behavior among regional stakeholders that help FFWNY achieve its priority goals. A communications consultant should be contracted to lead development of the plan and guide the initial stages of implementation.

Further guidance is provided in Appendix G.



7 FFWNY should build awareness of and the capacity to inform the local and state policy processes in support of a more resilient and equitable food system.

The RC should help raise awareness of policy issues related to farming and food systems and build capacity to inform the policy process and advocate policy positions.

- a. Working with partners across the region, the RC should host quarterly policy roundtable conversations to raise awareness of current policy activity.
- b. The RC and NYSAWG should coordinate to build capacity and knowledge among the RC, WG, and community members to engage with state and local policy makers by hosting trainings and facilitating legislative office visits and other approaches.
- c. The RC and NYSAWG should work in partnership with other local and statewide food and agriculture organizations and initiatives that engage local people in policy and build capacity through trainings and legislative office visits. (Black Farmers United NYS, Equity Advocates NYC, Food for the Spirit, farmer-based organizations, and others also offer trainings for this purpose.)
- d. Encourage individuals and organizations to reach out to their respective legislators, or if there is sufficient agreement within the RC, communicate to legislators on behalf of FFWNY as a whole.
- e. The RC and NYSAWG should partner with the UB Food Systems Planning and Healthy Communities Lab (UB Food Lab) to build capacity for local and regional policy work in WNY. Their expertise and experience in local and regional policy will be extremely helpful to the goals of this initiative and support the RC and the Work Groups as they work towards systemic change.

8 **Build out FFWNY's capacity and staffing.** To implement the recommendations outlined in subsequent sections of this report, and to ensure an inclusive and participatory approach, significant staffing for NYSAWG will be required for the next several years. Highly skilled and competent people, who are fairly compensated, will be essential. We recognize that reaching the recommended level of staffing may take some time and come in phases, depending upon the level of support committed by MFT and how that support can be leveraged to secure additional funding.

That said, we recommend the following staffing positions as critical to carry the work forward and achieve meaningful impacts on the food system:

- a. **Program Director** to oversee all aspects of the initiative. This person should be knowledgeable in food systems, have strong management skills, and be an excellent fundraiser.
- b. **Program Assistant** (shared with STW) to support administration, the Program Director, and Program Managers. This person should be half-time at minimal, but preferably full-time.
- c. **Three (3) Program Managers** to spearhead the selected core areas of FFWNY: Farmers and Markets; Finance and Infrastructure; and Equity and Food Sovereignty. This person will:
 - i. Work closely with the Work Groups to coordinate and advance their objectives and related opportunities
 - ii. Assist the PD in fund development efforts for work stemming from their core areas
 - iii. Build capacity of the WGs and other groups that emerge
- d. **Consultants, Contractors, and Partnerships**
 - i. **Communications consultant or contractor** to assist the initiative in design and implementation of the communication plan in a timely manner.

- ii. **Food and Racial Equity consultant or contractor** to provide guidance and direction to the equity/food sovereignty PM, help establish and inform the Food and Racial Equity Steering Committee, and work with the PM to advance the AES Work Group.
 - iii. Partner or contract with an established fund management organization, such as Fair Food Fund to establish a food and farm business fund that would pool investments from regional and national sources to invest in farm and foodbusinesses and BIPOC and other entrepreneurs, and establish a system for providing needed technical assistance. (see Finance recommendations)
 - iv. A Grant Writer made available to both non-profits as well as businesses and farmers to assist them in identifying funding opportunities, navigating the grant application process and help in writing proposals.
 - v. Other consultants deemed necessary by the RC, Work Groups, MFT or NYSAWG.
- e. Estimated annual cost for staffing, consultants, WG support and basic non-personnel costs: \$650,000 - \$750,000.



ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

This project would not have been possible without the support and involvement of scores of people, Working Groups, partners, funders, advocates, organizations and more who collaborated to make it all possible. To all of you, we give a hearty "thanks" for your critical contributions.

Regional Advisory Council

Simeon Banister
Cheryl Bilinski
Megan Burley
Linnea Carlson
Allison DeHoney
Tara Ellis
Mitch Gruber
Chris Hartman
Kimberly LaMendola
Tom Lowe
Chris Noble
dt ogilvie
Joan Petzen
Samina Raja
Jen Regan
Michael Snyder
Marlene Wakefield
David Walczak
Rebekah Williams
Alexander Wright
Catharine Young

Access Equity and Sovereignty Work Group

Omar Abdel-Kerim
Simeon Banister
Sheila Bass
Harper Bishop
Takiyah Butler
Shontae Cannon-Buckley
Linnea Carlson
Tim Chen
Allison DeHoney
Rita Hubbard-Robinson
Leslie Knox

Jeanette Koncikowski
Reverend Kwame Pitts
Tom Lowe
Elias Martinez
Nathaniel Mich
Della Miller
Pastor George Nicholas
Samina Raja
Jen Regan
Michael Snyder
Jared Strohl
Ignacio Villa
Marlene Wakefield
TC Washington
Rebekah Williams
Alexander Wright

Farmer and Producer Work Group

Matthew Agle
Megan Burley
Katie Carpenter
Rachel Chrostowski
Allison DeHoney
Kristin Heltman-Weiss
Joe Kurtz
Mahamud Mberwa
Wil Moss
Chris Noble
Mike Parkot
Joan Petzen
Katie Pfohl
Greg Putney
Jake Stevens
Marlene Wakefield
Alexander Wright

Finance Work Group

Claire Finnerty
Max Mack-Hardiman
Purnima Mohan
dt ogilvie
Joan Petzen
James Pierce
Nathan Rudgers
Laura Scondras

Infrastructure Work Group

Brett Baker
Lynn Bliven
Phil Bianchi
Martin Broccoli
Silas Conroy
Laura Fox
James Galbato
Michael Gardinier
Jill Gould
Chris Hartman
Giovanni Holmquist
Kimberly LaMendola
Cullen Naumoff
Lanika Sanders
Phoebe Schreiner
Gina Wieczorek
Jen Noble
Catharine Young

Markets and Buyers Work Group

Cheryl Bilinski
Mitch Gruber
Marla Guarino
Jessica Gilbert
Bre Haley

Chris Hartman
Derek Nichols
Cameron Schauf
Stefan Schwartz
Myron Thurston
Dave Walczak
Rebekah Williams

Site Visit Hosts

Abers Acres
African Heritage Food Co-op
Burley's Berries & Blooms
Brigiotta's Produce
Buffalo Food Equity Network
Burchfield Penney Art Center
Chautauqua County Food Policy Council
The Commissary
Cornell Cooperative Extension of Erie County
Cornell Cooperative Extension of Genesee County
Eden Valley Growers
EPIC
FeedMore WNY
Field and Fork Network
Foodlink
Gakwi:yo:h Farms
Innovation Center
Jericho Road Community Health Center
Marquart Farms
Massachusetts Avenue Project
Matt Urban Center
Noblehurst Farms

Orleans County Produce
Piechocki's Farm
Providence Farm Collective
Rochester Area Community Foundation
Roycroft Campus Corporation
United Apple Sales
Upstate Niagara Cooperative
Urban Fruits & Veggies/
Buffalo Go Green
Wilson Beef Farms
Wyoming County Ag and Business Center

Work Group Convenors

Abby Bennett
Omar Abdel-Kerim
Joe Kurtz
Claire Finnerty
Lanika Sanders
Bre Haley

SCALE Team

Anthony Flaccavento
John Fisk
Euneika Rogers-Sipp
Michael Shuman

Moving Forward Together

Highmark Blue Cross Blue Shield of Western New York

Community Foundation for Greater Buffalo
Erie County
First Niagara Foundation
Health Foundation for Western & Central New York
James H. Cummings Foundation
The John R. Oishei Foundation
M&T Foundation
Ralph C. Wilson, Jr. Foundation
Western New York Foundation

Fiscal Sponsor

Southern Tier West Development Foundation

WNY Regional Food System Initiative Final Report Release Event Supporters

Buffalo Bills Foundation
Highmark Blue Cross Blue Shield of Western New York
The Martin Group

Other Partners

Food Systems Planning and Healthy Communities Lab at University at Buffalo
Carolyn Human Communications
The Martin Group



PROJECT METHODOLOGY

PROJECT METHODOLOGY

PROJECT METHODOLOGY

There are a number of different ways by which consultants can gather the information needed to develop an assessment of a region's food system. In this project, the SCALE team used a ground-level approach that focused on gathering information from a wide array of food system stakeholders within the region, rather than using broader aggregations of data, such as the USDA Census of Agriculture, or New York State assessments as the main source of information. To be clear, the SCALE team read every study we found related to various parts of the WNY food system, as well as case studies, assessments and plans written over the past eight years. These provided helpful context while also generating leads for further investigation. *Both quantitatively and qualitatively, however, the information used to develop our assessment and recommendations came from the farms, businesses, organizations, and people directly engaged in the region's food system.*

This ground-level information gathering was obtained in multiple ways, each briefly described below.

① **Surveys** – SCALE developed and disseminated five different surveys, each focused on particular types of food system participants. We received comments and suggestions on each of the surveys from a range of people familiar with the issues and were also aided greatly in dissemination of the surveys by staff from Cornell Cooperative Extension (CCE), local grassroots organizations, regional networks and associations, and members of the Regional Advisory Council and the Work Groups. Below is the number of respondents to each survey.

- Farmers and food producers, with 61 respondents
- Aspiring farmers and food entrepreneurs, with 50 respondents
- Markets and buyers, with 45 respondents
- Farmers markets managers, with 27 respondents (out of 54 markets in the region)
- Food system leaders and advocates, with 45 respondents
- BIPOC and grassroots Food and Racial Equity leaders, with 72 responses

While the sample size of respondents is relatively small—with the exception of the farmers market managers' survey, where half of all markets in the region responded—it should be noted that this range of numbers is typical of response rates in food system assessments. SCALE has used and "tested" these responses against information gathered by other means, including direct interviews, group conversations, site visits, and prior studies. Overall, the surveys confirmed some findings, challenged others, and provided insights into specific issues and/or groups of stakeholders.

② **Stakeholder interviews** – With guidance from our local partners, SCALE undertook more than 100 hour-long interviews with a wide and diverse range of food system leaders, actors, and advocates beginning in the second month of the project and continuing intermittently throughout the first 15 months of the project. The initial round of about 40 interviews was undertaken in part to develop a pool of candidates for the RAC, while also contributing to the consultants' understanding of the food system and uncovering of other important food system stakeholders for future interviews.

Following this first round, which was completed in March 2021, interviews continued for most of the balance of the project, constantly expanding the range of experiences and perspectives, and enabling us to gain a much deeper understanding of key issues.

③ **Site visits** – The SCALE team conducted four site visits. Three involving team members John Fisk, Euneika Rogers-Sipp, and Anthony Flaccavento. The fourth was a solo visit by team member Michael Shuman. These visits took place during June 2021, September 2021, March 2022, and May 2022. Each involved multiple stops, meetings, and gatherings, with more than 50 different sites or group gatherings altogether. All four site visits maintained a regional scope, with stops from Rochester to the Southern Tier.

The selection of who, what, and where to meet during each of the site visits was done in consultation with our local partners, the RAC, and the Work Groups. The site visits proved critical in deepening the consultants' understanding of not only the issues and problems, but also the many ongoing and emerging strategies for improving the food system. They also significantly strengthened connections and relationships of stakeholders within the region while building trust and ownership of the project itself.

④ **Prior studies** – An initial group of about ten studies was recommended by the local partners, which were reviewed by the SCALE team, helping to build a foundation of understanding of the food system. Beyond that, additional studies, assessments, and plans were read by the team in response to recommendations by stakeholders on the ground. A list of these studies is contained in Appendix B.

⑤ **Regular discussions with members of the Regional Advisory Council and the five Work Groups** – Perhaps more than any other source of information, the RAC and the Work Groups provided the SCALE team with more depth of knowledge, more candid critique of the food system status quo, and more ideas for recommendations to improve the food system than any other. The depth, breadth, and richness of this information came in part because the 70 or so people involved in one of these entities brought extensive knowledge and hands-on experience to the issues, along with a strong commitment to positive change. Additionally, meeting regularly—at least monthly and, in some cases, bi-weekly—for ten months or more allowed the consultants and these stakeholders to consider ideas, explore them through additional research, and create subgroups that focused on specific issues in some depth. The strong relationships that were created, beneficial in and of themselves, also helped facilitate more candid discussions.

Each of the five WGs also undertook an informal SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to help determine their focus and priorities. These also contributed to the consultants' understanding of the WNY food system, and summaries are included in Appendix C and Appendix D.

These five approaches to information gathering provided the SCALE team with a breadth of information from across the region and from a very diverse range of perspectives. It also enabled us to dig much more deeply into challenges and opportunities than outside consultants are typically able or willing to do, grounding our recommendations and building the foundation for concrete action immediately following the completion of this phase of the project.

“I WAS SKEPTICAL ABOUT THIS PROJECT AT THE START, SO MANY DIFFERENT PERSPECTIVES AND OBJECTIVES. AFTER A FEW MEETINGS, ALL THESE DIFFERENT GROUPS BEGAN TO PULL TOGETHER SOME INTERESTING IDEAS. NOW I HOPE WE CAN KEEP THIS GROUP ENGAGED AND BUILD A BROADER NETWORK THAT CAN HELP LOCAL FARMS TEAM UP TO BUY, MARKET, AND LEARN TOGETHER.”

– **MATTHEW AGLE**, HENRY W. AGLE & SONS FARM, EDEN



APPENDICES

APPENDICES

APPENDIX A: SCALE Team Members and their Roles in the Project

The four members of SCALE's team – Anthony Flaccavento, Euneika Rogers-Sipp, John Fisk and Michael Shuman have a broad, diverse base of experiences, along with a significant overlap in our values, capabilities and beliefs about how best to build more just, inclusive and sustainable food systems. That overlap includes a deep commitment to participatory research, to empowering means of engagement and to ensuring that community stakeholders co-design the process and 'own' the outcomes. That unfolds a bit differently in every place, of course, but our collective experience has helped us understand what is most effective in building this engagement and ownership.

Throughout our work with the Western NY Foundation and other core partners, we will function as a team, making sure that all four consultants have significant influence on key decisions about design and implementation, including in those cases where one of us has more experience and expertise in a particular area. As an example of that, Michael Shuman will lead the design of work related to economic assessments and the potential for development of novel forms of food system investment. Michael's design, however will likely be influenced by Anthony's experience working with farmers and Euneika's approach to ensuring broad, inclusive participation across race and class.

While taking a team approach, we recognize the different skills sets and experiences we each bring, and plan to utilize those to the fullest. Here then is a brief description of the primary roles we envision for each team member.

Anthony Flaccavento will be the team leader, convening all meetings and discussions among the four consultants, working with the WNY-based support staff to schedule and promote a range of meetings and actions within the region, and providing the primary contact for the WNY core team of project leaders. In addition to this broader role, Anthony's experience as a farmer, rural development consultant and founder of several food system businesses and infrastructure enterprises will help the team more effectively engage farmers, food system and related businesses, and rural and small-town stakeholders who might normally be hesitant to get involved. Anthony also has contacts with PUSH Buffalo and with the Corbin Hill Food Project in NYC, both of which will help ground and steer our work.

John Fisk will help co-lead the team in all of the convening and communications functions described above, while providing the widest range of knowledge about food system issues, innovations and potential partners and models that might have relevance. John, who is also deeply grounded in the technical and ecological dimension of farming, will be our "best practices person", drawing upon the many lessons learned from his 20+ years with the Wallace Center and before that, the W K Kellogg Foundation. As our team develops a deeper understanding of the challenges and opportunities for the WNY food system, John will bring these learnings to bear, and where appropriate, engage with some of the innovators and leaders themselves from other parts of the country.

Euneika Rogers-Sipp will lead the team's design of community outreach and engagement processes, ensuring that our efforts are both adapted to the different communities across the region, and structured to ensure that the communities themselves are 'co-designers' of the process. Euneika applies her experience of 20+ yrs of interdisciplinary design work centered in social justice rooted in the historically and culturally rich region of the Black Belt South, the founding of the Destination Design School of Agricultural Estates, and regional wealth-creation models in sustainable rural economic development to inform highly-effective and inclusive community outreach, engagement, and planning processes, particularly focusing on segregated and long-distressed neighborhoods. Euneika's approach reinvests stakeholders' role within the food system addressing root causes of structural inequities and paves sustainable paths for making healthy food available to all. Her work as a Harvard Loeb Fellow strengthens her framework for community engagement and connects WNY stakeholders with a diverse food system and social justice network.

Michael Shuman is one of the country's premier thinkers, writers and consultants on the development of diverse, wealth-building, resilient local economies. Unlike many writers and thinkers in this area, Michael regularly puts his ideas to the test in small towns and big cities across the country, helping local communities to design, test and implement a range of strategies geared to bring about stronger local economies. Michael will bring this experience and expertise - including, in particular his work on mobilizing local capital to the benefit of local food system enterprises - to the design and implementation of all aspects of the economic and food system financing elements of this project.

All four consultants have considerable experience and outstanding skills in community facilitation, across rural and urban communities, and all four will bring those skills to bear during the project.

APPENDIX B:

Summary of Studies, Reports, and Plans Reviewed by SCALE Team

Regional Food Systems

[Local Food Action Plan 2020 – 2024](#)

Produced/Sponsored By: Food Policy Council of Buffalo and Erie County

[The Niagara Falls Local Food Action Plan](#)

Produced/Sponsored By: Create a Healthier Niagara Falls Collaborative

[Cultivating Prosperity in Chautauqua County Leveraging the Food System as a Catalyst for Economic Development](#)

Produced/Sponsored By: Chautauqua County Department of Planning and Economic Development, and the Chautauqua County Growing Food Connections Steering Committee

[Bridging Divides: Opportunities for Connecting Farmers and Underserved Consumers in Chautauqua County, New York](#)

Produced/Sponsored By: Growing Food Connections

[Growing Together](#) (technical report informing the sustainable food access and justice element of One Region Forward)

Produced/Sponsored By: One Region Forward

[New York State Food Supply Resiliency Report](#)

Produced/Sponsored By: New York State Ag and Markets
Feb 2021

Community and Economic Development

[A New Way to Plan for Buffalo Niagara](#)

Produced/Sponsored By: One Region Forward
Feb 2015

[A Strategy for Prosperity in Western New York](#)

Produced/Sponsored By: WNY Regional Economic Development Strategic Plan
Nov 2011

Institutional Procurement

[30% NY Initiative: Opportunities, Barriers, and Pathways to Success](#)

Produced/Sponsored By: Cornell Cooperative Extension Harvest NY and Cornell Cooperative Extension Allegany County
Jan 2022

[On the Plate at SUNY](#)

Growing Health, Farms and Jobs with Local Food
Produced/Sponsored By: American Farmland Trust, and The New York Academy of Medicine
May 2018

Mobile Markets and Alternative Retail

[“Operational challenges that may affect implementation of evidence-based mobile market interventions”, Kasprzak et al, in BMC Public Health, 2022](#)

APPENDIX C: SWOT Charts from Work Groups

Access, Equity, and Food Sovereignty SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Brings attention to equity and generates increases in equity • Creates inclusivity • Long term benefits are inevitable when centering equity • Large and diverse stakeholder participation increases chances of network-building, collaboration and successful change • Helps minimize unanticipated adverse consequences of actions, proposed policies, institutional practices • Brings racial equity explicitly into decision making in order to avoid perpetuating racial inequalities 	<ul style="list-style-type: none"> • Requires time from BIPOC leaders who already have many demands and requests for their time and participation • May not move as quickly as other methods that do not center equity • May take more effort to combat entrenched systems including those that many people are not aware of as dominant systems • Requires funding in order to bring in experts
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Centering racial equity creates attention and priority in an area that has historically been overlooked • Attention to racial equity will increase equity in many facets 	<ul style="list-style-type: none"> • Sustaining dialog and understanding about equity over disparate areas • Deep rooted bias and beliefs • The challenge of productively confronting systems that decrease equity

Note: The S.W.O.T for Food and Racial Equity above is one of four subgroup S.W.O.T charts developed by the Access, Equity, and Food Sovereignty workgroup (the others are Land and Food Sovereignty; Healthy Food and Community Wealth Building; and, Locally Sourced Food Networks). [see more on these resources on the Food Future WNY website and [Appendix L](#)]

Farmer SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Abundant water • Relatively high percentage of prime farmland • Scenic beauty/tourism destination • Diverse, high quality farm products • Numerous farmers markets • Expanding e-commerce biz's • Three strong food hubs link farmers to larger buyers • Dairy co-op, dairy processors at several scales • Urban farmers in Buffalo actively collaborate, support one another 	<ul style="list-style-type: none"> • Short growing season • Unequal access to land; very high cost • Relatively small amount of season extension infrastructure • Uneven access to better markets • Farmers markets small, limited sales opportunity; some don't take SNAP • Prices paid by larger buyers generally low • Insufficient & declining USDA meat processing infrastructure • Difficult state regulations around food processing • Micro and large farms, but declining mid-size farms
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Season extension for veg growers • Land trusts working to make farmland available • Increasing commitment from institutions to buy local, from BIPOC businesses • Farmer networks emerging to reduce costs, increase markets • Interest among hubs, distributors in coordinating, syncing logistics/delivery • Innovative meat processing (AFB) has potential for replication in other parts of region; could be adapted to dairy • Investment and training for vendors and market managers would increase SNAP use • Growing demand for culturally appropriate, more diverse foods 	<ul style="list-style-type: none"> • Farm consolidation squeezing out small farmers • Development pressures on land, land prices • Big solar competing for prime ag land • Input costs rising fast • Labor challenges, including new NYS farm labor law • Continued consolidation of meat and dairy farms and processors

Markets, Buyers, and Supply Chain SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • WNY has several regional food distributors with capacity to supply food service and retail markets channels • Buffalo Public Schools Farm to School program and growth in purchasing from BIPOC farmers. They can be a model and the supply chain they built available to others • The University of Rochester purchases over 60% of its food from local sources and is available to help others learn • Values driven sourcing, particularly NYS grown, is supported by the state through various purchasing programs • Rich agricultural history and well-developed food processing sector for larger scale production, especially in dairy. • Rochester Public Market provides market for smaller producers and food access for residents. 	<ul style="list-style-type: none"> • Short growing season limits the timeframe and supply of produce available in the marketplace • Local and BIPOC food producers are small scale and need to work with aggregators to reach large market channels • The SUNY schools each handle their food procurement independently rather than in alignment with a shared sustainability standard • For the most part, city officials have not supported urban food and agriculture systems development • Scale appropriate distribution to main market centers outside the region is limited and expensive • Supermarket chains have moved out of lower income neighborhoods • Food industry incubators are underutilized by communities of color partially because the programs are not as accessible as should be
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Several hospitals in Buffalo-Niagara are working with BNMC to increase values-based procurement • When foodservice contracts are renewed is the opportune time to include value base procurement requirements • Support is available from NGOs and CCE and others when institutions want to partner to increase their values-based purchasing • Season extension for small and mid-scale farms will expand their market access • Moving more farms towards regenerative production practices may help them access markets that seek to support climate goals. • Local, regional and perhaps other value-based sourcing is generally supported by rural legislators as rural economic opportunity • New Food Policy Council in Rochester • Headwater is building a distribution network to reach NYC and other market centers • Lack of grocery stores in inner city neighborhoods can mean business ownership opportunity for BIPOC entrepreneurs 	<ul style="list-style-type: none"> • The cost of freezing and other processing for local produce can push it out of the range for most buyers. • Smaller school districts cannot afford farm to school admin to track NYS purchasing and it's easier to purchase federal commodities, so need dedication from food service director • State efforts to meet climate goals may discourage local sourcing unless production is aligned with regenerative agriculture • Growing farm production costs due to supply chain issues and higher wages in NYS may make NYS grown too expensive • Supermarket companies in the region are getting bigger or consolidating and may reduce their commitment to regional food purchasing • Lack of accepted clarity and knowledge of inequities, specifically racial, and no shared value system and commitment to understanding the historical inequities in the food system

Financial Ecosystem SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Many federal and state subsidies are available for FFBCPs. • Significant regional collaboration networks exist which could focus on FFBCP investment. • Many philanthropies and foundations are interested in FFBCPs. • The region enjoys a large number of private banks and credit unions capable of lending to FFBCPs. • Several prominent CDFIs exist to help FFBCPs led by low-income entrepreneurs. • Farm Credit East helps many farmers get investment. • Several important micro-loan programs operate in the region. • Kiva in Buffalo and Rochester supports early stage FFBCPs with interest-free loans. • Common Owner is a new, federally licensed investment crowdfunding platform based in WNY. • Myriad business support programs exist to help get FFBCPs “investment ready.” 	<ul style="list-style-type: none"> • Generally, the region is conservative and risk averse about financing FFBCPs. • Many FFBCPs, especially those run by BIPOC entrepreneurs, complain about the difficulty of finding capital. • Farmers need more help buying or securing farmland. • Significant education of local businesses and local investors needed to create a viable local investment marketplace. • New Markets Tax Credits not used enough for FFBCPs. • Venture capital uninterested in FFBCPs. • FFBCPs are not capital intensive, which weakens opportunities for equity investors. • Few patient-capital sources exist for FFBCPs. • Few foundations make mission-related or program-related investments in local FFBCPs. • Slow Money, which has spearheaded local investment in FFBCPs all around the country, is barely present in WNY. • Existing programs cannot easily reach immigrant communities
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Provide tax credits to FFBCP investments. • FFBCP funds, financed through grassroots capital, could be created privately to remedy gaps. • Government agencies could help underwrite FFBCP funds with bonds and other tools. • Greater use of loan-loss reserve guarantees could stimulate FFBCP lending. • New partnerships for FFBCP investment could be led by anchor institutions in the region. • Crowdfunding for FFBCPs could be greatly expanded through inexpensive initiatives. • New ownership models like worker-owned cooperatives could open new opportunities for grassroots investment in FFBCPs. • Social impact bonds could be developed for FFBCPs. • Regional branding around all the above could augment local investing in FFBCPs. 	<ul style="list-style-type: none"> • WNY infrastructure for FFBCPs urgent needs more public investment. • NY State has a hostile regulatory environment for local investment. • Bank consolidation means less capital available for local FFBCPs. • 4 NY State continues to tilt its public resources to attracting outside business (an inefficient and largely discredited economic-development strategy) rather than nurture local businesses.

Infrastructure SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Three strong food hubs operating • Diverse and numerous food businesses • A dozen or more distributors in WNY • Three strong and growing food e-commerce businesses increasing local purchasing • Several local or regional dairy products brands, including ice cream, yogurt, cheese • Some excess food processing capacity exists in Buffalo, Rochester 	<ul style="list-style-type: none"> • Insufficient and declining meat processing facilities • Aggregation, processing infrastructure doesn't reach whole region • NYS regulations on food processing make it difficult, expensive for newer, BIPOC entrepreneurs • Lack of capital access • Rising cost of labor, transportation, other inputs
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Two new meat processing facilities recently opened • Third processor, Alliance Farm Butchery, has potential for replication across region • Consumer demand for local and BIPOC/women-owned food products is growing • Increasing number of entrepreneurs want to expand food businesses • Influence state and local policies to support, prioritize local and BIPOC farm and food businesses • "Micro-fulfillment", i.e., creating small retail hubs to meet local demand • Development of sub-hubs to expand access for farmers and consumers 	<ul style="list-style-type: none"> • Corporate consolidation of farms, processors increasing • Inflation, economic insecurity increase risk for farms and food businesses • Increasing dominance of non-local, big box retailers hurts local grocers, reduces demand for local products • Climate change exacerbating production challenges • Persistent supply chain challenges undermine farms, businesses

APPENDIX D: SWOT Analyses from Work Groups

The following SWOT analyses were undertaken with the Work Groups in concert with SCALE team members.

WNY Farmer/food system SWOT Analysis.

Conducted during the 11/22 meeting of the Farmer Work Group

Summarized on 11/24 by AF

With the four main goals of the Farmer WG in mind, we conducted a brief SWOT analysis of the WNY food system from farmers' perspective.

- **Strengths**

- Lots of farmers markets across the region, many of which are seeking more vendors
- Though it is not universal at these FMs, many have begun to accept SNAP/EBT, along with 'double bucks' programs through NYS
- Though land prices are rising, there continues to be unused and underused land available for farmers, especially those not needing huge parcels
- Small farmers do better when selling in more affluent markets (This is probably a weakness and opportunity as well as a strength)
- Land trusts, including the WNY Land Conservancy (as well as the NE Farmers of Color Land Trust) present opportunities for new and limited resource farmers to get started

- **Weaknesses**

- SNAP is not accepted at all farmers markets in the region; need help/resources to get the needed infrastructure to accept EBT and dispense tokens
- To increase both farmer and consumer involvement, need much more/better education and outreach around SNAP and local foods/farmers markets
- WNY Land trust can work with smaller acreage farmers, but urban farmers are too small to fit their criteria
- Don't have enough information about markets, especially who the consumer base is in rural areas
- Extremely limited meat processing capacity, as well as other kinds of value-adding infrastructure
- Some things 'catch on' , then are overdone, for example, 'barn events' (weddings, etc) have flooded the market
- We have big farms and microfarms, but not much in between (or this group is struggling)
- Prices for farm products generally too low for farmers to make a living; especially true for Dairy (suggestion to look at what PA is doing to help improve dairy prices)
- Aggregation and distribution is not strong enough for mid-scale farms
- Difficult to bring all the different scales and types of farms together in one cohesive effort
- We need to 'decrease the friction of transaction' between farmers and consumer (ie, make it easier, more convenient)

- **Opportunities**

- Training of farmers and FM managers re how to accept and utilize SNAP
- Small investment to help FMs with needed infrastructure to accept EBT
- Opportunity to connect newer/smaller/limited resource farmers to fallow farm land, as well as to peri-urban lots of 10 or so acres
- This could also help farmers get up to min \$10K annual gross sales, which would qualify them for an "agriculture assessment" and lower taxes

- NYS has \$ available for farmland protection and conservation easements, which allow farmer to continue farming while getting fund for improvements
- Agritourism, esp with proximity to lakes, wineries, etc is underdeveloped opportunity
- Potential for a collaborative and/or cooperative approach to dairy processing, possibly modeled on what Greg and Mike are doing with their multi-farmer meat processing facility
- Potential to aggregate and ship meat boxes to larger markets, including NYC
- Profitability for farmers needs to be elevated as a goal for all of this work
- Expand breadth of product offerings to meet new/emerging markets for local foods

- **Threats**

- Increased pressure on land availability/cost from large-scale solar
- CAFO regulations are contributing to rising land costs, as smaller operations are also impacted by the regs (Note: not sure if I understood or captured this properly)
- Meat processing bottleneck is critical and must be addressed quickly to avoid loss of many smaller meat operations
- WNY may not have enough affluent markets for farmers to get the prices they need to stay in business and make a profit

Markets and Buyers WG SWOT Exercise: Approximately eight one-on-one interviews were conducted and one small group session to populate this exercise. We used the SWOT sequence for the interview but aggregated strength/weaknesses/opportunities/threats responses by issue area below.

- **Institutions and Procurement**

- Buffalo Public Schools has shown success in purchasing from BIPOC farmers and they have a good farm-to-school program. They can be used as a model and what they have done could be replicated in other school systems.
- Large schools can afford the admin for farm to school but in the surrounding areas you need a food service director dedicated to the cause. It is easier for them to purchase federal commodities than to keep track, but they developed software to see where their procurement dollars are going to.
- USDA and DOD (defense) programs. You have to be very large to be able to service schools because there is so much money the DOD puts out for fresh food. Either have to service the whole region or nothing with contracts. A huge hurdle to break into schools because they'd rather use the free money. In order for a small company like Brigiottas to come to the table with DOD they would all have to link with someone large from out of state that deals with central NY.
- Produce Peddler is more involved with suburban public schools. Purchasing a variety of vegetables. Plan the menu with them based on seasons and what's available. Eden VG does not process, there is another party involved for that.
- Eden VG is trying to work with Roswell health care (hospital), and they are independent, so they have more flexibility.
- Procurement power of big institutions such as U of R, Suny Geneseo, Rochester Public Schools for example.
- Renewal of the foodservice contracts is an opportunity for change
- People in food service do not know how to go after grant money. We need an organization that can come in and help people get funding
- Seasonally, there's a lot of products available. A lot of sources for us now we can utilize to get food from farms to our operation (institution). Our region is getting better at processing. Headwater food hub does a lot. All of the distributors are doing a lot more when it comes to tracking where the food is coming from

- **NYS legislation/policy/culture**

- NYS is a forward state and is supporting the local food movement. NYC is pushing a local food goal of 25% of the food from NY for public entities outside of public schools and 30% for schools.
- Ag and markets, department of health, department of education - 3 significant areas. Have all been forced or inspired to embrace local/regional food. AG and market want to help disadvantaged farmers. Looking for ways to favor them.
- More people are invested in food systems and more consumers are aware
- Labor costs are higher in NY compared to the states around us. Also, the OT threshold will cause workers to go out of state and drive up use of automation in larger farms. H2A could help with this. (This one fits in several areas)
- A lot of funding and grants going into food systems right now. Ex: Nourish NY, USDA Grants. We need to help farmers apply and receive funding. Also, we need to help them understand capital investment. (Also fits in Farmers)
- Examples:
 - GMU 103: "Senator Michelle Hinchey (SD-46) today announced legislation (S.7534) that would make New York the first state in the nation to establish a food procurement system encouraging public institutions to direct their buying power toward businesses that represent core values, which can include environmental sustainability, racial equity, fair labor practices and pricing for farmers, local economic benefit, nutrition, and animal welfare".
 - NY Food Forward Plan - "Mayor Bill de Blasio and the Mayor's Office of Food Policy (MOFP) announced today the release of the City's first ever 10-Year Food Policy Plan, "Food Forward NYC," a comprehensive framework for a more racially and economically equitable, sustainable and healthy food system for all New Yorkers that addresses the profound social, economic, health, and environmental challenges currently facing our city."
 - NYS Food Waste Recovery Act requires large organizations to compost or give extra food to shelters
 - Climate Leadership and Protection Act (NYS)
- Policymaking is a key driver for change in each aspect. Not just policy itself, but the field of practitioners and their relationship with the industry. The capacity to work in the policy space in the region.
- Policy from the standpoint of food and food systems. There's an opportunity because it is common knowledge that WNY is a big powerhouse in terms of influencing policy. Policymakers pay attention to grassroots folks from WNY. There's a lot of people working in bubbles. People become so specialized and only speak on those narrow areas.
- We need to keep energy level high and keep people interested
- Rural legislators are excited about food system opportunities. Legislators seem to have continued interest.
- Local council members aren't interested in food systems and are not listening to the people talking about it

- **Inequity**

- There is historic exclusive nature to land ownership, and it's historically not diverse with policy which still plays out today. Only about 1% of farmers and food processors are of color in NY
- Lack of accepted clarity and knowledge around inequities - specifically racial. We don't have a shared value system and commitment to understanding the historical inequities in the food system
- Food industry incubators are underutilized by communities of color and minorities partially because the programs are not as accessible as they should be

- **Natural resources and geographic location**

- We attract large food manufacturers such as Barilla and Bonduel
- We have natural resources that support agriculture such as fresh water, land, soil, and lakes. Also, we do not have wildfires like out west.
- Rich agricultural history and existing infrastructure. Our infrastructure and climate are very versatile
- Has always been a historical flow from food from WNY to NYC via Erie canal.
- Population dynamics: NY as a state saw some losses in the census, but buffalo saw some gains of around ten thousand, but Rochester saw less than one thousand. This may seem small, but this is the first gain seen in fifty years. Rural communities saw losses though. Thinking about this in terms of labor. A lot of communities were rooted in manufacturing but now they experience population loss.

- **Distribution and Collaboration**

- Access to markets - NY, Boston, DC, all within a few hours. Distribution is an issue.
- We have underutilized transportation systems. Smaller farmers/producers can collaborate. Cornell has experts and consultants in this area to connect with the USDA
- There is interest in collaboration in systems thinking. Examples are Great WNY Collaboration, Buffalo Go Green, Farm School NYC, Grassroots Org, the Better Together Campaign. Also, there is cross-state collaboration on advocacy
- EVG started their own trucking company during covid, to reduce risk but also distribute for others, revenue.
- Some distribution issues. For example there's no way to get products straight from Mohawk Valley (east of WNY) to NYC
- Headwaters is building a statewide distribution network with partners. The first product is the IQF NY product. They are working with Upstate Growers and Packers
- The Infrastructure WG is looking for collaboration with logistics/sub hubs

- **Retail**

- We have Wegmans. Mixed views around Wegmans - some think they want to utilize local but some worry it's not as important to Wegmans anymore because customers prioritize price and quality above local. Wegmans does not have contracts with buying locally, if they find a price they are not obligated to continue buying locally. They're not the partner that they used to be. Wegmans replacing branded local foods with Wegmans brand.
- EVG has a good relationship with Hannaford, Wegmans, etc.
- We also have Tops, Dash, and Aldi in our area
- Other retail models such as mobile markets and farmers markets
- Bargain grocery in Utica offers fresh food at affordable prices, creating food access and diverting food waste
- Large retailers are not supporting the farmers and they (the retailers) don't want to do more than they're doing right now
- The retail model has proven that as long as there aren't laws and regulations that force retailers to have locations in underprivileged areas, they won't
- Food lockers - positioning them in more rural areas and food deserts - convenience stores that don't want to merchandise. food lockers are going to be a large key to that. putting food lockers in libraries because every community has them. a lot of times they are within walking distance of community centers.
- Rochester public market has individual farms and people acting as distributors. bringing people together and putting faces to the food you are buying
- Broadway market in Buffalo is on a revitalization pathway, could be a great market, needs a lot of work though.

- The cost of everything has gone up dramatically, making it difficult for farmers and producers to operate
 - Huge amounts of capital for medium to large farms. Good for the most part but if you don't have the revenue history it isn't that accessible. Smaller farms have a harder time accessing capital. It's all about the market demand. Access to capital only happens when the revenue is up
 - Connecting with the municipal level to conserve farmland from development
 - Would like to use hydroponics to use them year-round. A lot of greenhouses are empty outside of the season. It would be great to be able to grow year-round. utilizing greenhouses meant for flowers for vegetables. You can add artificial light and go vertical when using hydroponics with greens.
- **Processing**
 - If you look at this region as a whole, we attract some of the biggest food manufacturers in the entire world. Barilla has a packaging plant in Avon, and every "Lunchable" comes from this plant, and the largest food manufacturer in the world - Bonduel - has a major plant in Brockport. Part of the problem is that we have not connected the dots very well. Bonduel comes to this region because of the opportunity, so we need to figure out how to tap into that.
 - Lack of processing facilities. We need appropriately scaled processing facilities, and asset mapping could be a useful tool for this.
 - There needs to be a lot of product to make it worth processing, as it needs to be high volume to be price competitive. It is cheaper to buy a process than to do it in-house
 - Consumers want grab and go foods as they are more convenient

WNY, Infrastructure SWOT analysis

Compiled during meetings and through email communications during February and March of 2022

- **Strengths**
 - Three strong food hubs operating
 - Diverse and numerous food businesses
 - A dozen or more distributors in WNY
 - Three strong and growing food e-commerce businesses increasing local purchasing
 - Several local or regional dairy products brands, including ice cream, yogurt, cheese
- **Weaknesses**
 - Insufficient and declining meat processing facilities
 - Aggregation, processing infrastructure doesn't reach whole region
 - NYS regulations on food processing make it difficult, expensive for newer, BIPOC entrepreneurs
 - Lack of capital access
 - Rising cost of labor, transportation, other inputs
- **Opportunities**
 - Two new meat processing facilities recently opened
 - Third processor, Alliance Farm Butchery, has potential for replication across region
 - Consumer demand for local and BIPOC/women-owned food products is growing
 - Increasing number of entrepreneurs want to expand food businesses
 - Influence state and local policies to support, prioritize local and BIPOC farm and food businesses
 - "micro-fulfillment", ie creating small retail hubs to meet local demand
 - Development of sub-hubs to expand access for farmers and consumers
 -

- **Threats**

- Corporate consolidation of farms, processors increasing
- Inflation, economic insecurity increase risk for farms and food businesses
- Increasing dominance of non-local, big box retailers hurts local grocers, reduces demand for local products

Finance SWOT Analysis

Below is an unabridged elaboration of the Finance WG's SWOT analysis (which is summarized in the report's findings).

- **Strengths**

- Subsidies – Many kinds of subsidies for FFBCPs are available from various federal and state agencies.
- Regional Collaboration – Many existing collaboratives among counties, local governments, foundations, and businesses in the region could generate substantial new capital for FFBCPs.
- Soft Money – The region has numerous philanthropies, including some very large newcomers like the Ralph Wilson Foundation, that could and do provide capital to FFBCPs. Among the important legacy foundations are the Gebbie Foundation, the Lenna Foundation, the John Oishei Foundation, the Ralph C. Sheldon Foundation, and the Western NY Foundation, along with many community foundations.
- Banking – There is no shortage of banks and credit unions scattered across the region. Generally, these institutions are more likely to provide loans for buildings or equipment (which can be collateralized) than working capital. Sometimes they partner with SBA programs to provide small loans for small food businesses.
- CDFIs - The region has several institutions with the federal designation of community development financial institutions (CDFIs), which provides federal grants, loans, and technical assistance to provide capital to low-income and BIPOC entrepreneurs. Among CDFIs in the region are Launch NY, Pathways, the Westminster EDI, and the Chautauqua Credit Union.
- Farm Credit – Farm Credit East is actively involved in the WNY region. Generally, it provides cheaper credit than commercial banks, but sometimes it will partner with banks on larger projects. It can issue bonds like federal treasures to raise capital on public markets. County and local government have sometimes partnered with Farm Credit to support targeted value-added producers.
- Microloans – Small and micro-loans are available from a growing number of sources, including banks and CDFIs mentioned above, IBAs, economic development agencies (like the Buffalo Business Development Corporation), regional entities (Genesee Finger Lakes Council), and community development corporations. Occasionally larger loans are available; for example, the Erie County Industrial Development Agency lent \$180,000 for the EcoVerde composting business. Among nonprofits, a leading provider of loans and technical assistance in Rochester and Buffalo is the Pathstone Center.
- Kiva – Kiva facilitates small, interest-free loans to early-stage entrepreneurs. The program has a major presence in both Rochester and Buffalo.
- Crowdfunding -- In the universe of federally licensed investment crowdfunding, a recent entrant is Common Owner, which aims to promote more local ownership of businesses in WNY. Common Future focuses primarily on real estate purchases, but other food businesses with a physical footprint—like cafes, restaurants, breweries, or urban farms—could qualify for its offerings. The portal has hired a consulting company, Urban Vantage, to find potential BIPOC clients on the East Side of Buffalo. (The other 80 or so federally licensed investment crowdfunding portals also can be used by WNY businesses and investors.)

- Business Support Programs – There are active SBDCs, mentorship programs, women’s business support programs, incubators, accelerators, maker spaces, and commercial kitchens. Launch NY nurtures promising, high-growth businesses with incubation, mentoring, and capital, though few food businesses fit its high-growth requirements. ROC City Biz FastTrac in Rochester also helps early-stage entrepreneurs including those involved in FFBPs. GROW NY incubates food and agricultural technology companies. PUSH Buffalo has a coop boot camp. LISC is working with KIVA.

- **Weaknesses**

- Generally – Many observers describe the business environment in WNY as traditional, stodgy, conservative, and risk averse. This means more limited capital availability for FFBPs in rural areas and inner-city neighborhoods, because FFBPs are not considered “high growth.” Despite significant evidence to the contrary, for example, investment crowdfunding is viewed as a detriment for a business later to raise capital from mainstream markets.
- Big Gaps – Many successful, well-functioning food businesses are not getting growth capital. Put another way, the platitude that “all good businesses will find capital” is simply untrue. The strengths suggest that the biggest gaps are existing FFBPs, since small start-ups and high-growth businesses have finance options. Additionally, BIPOC entrepreneurs, whether they are based in urban food deserts or Native American reservations, lack the assets, credit histories, and social networks that are essential for many small businesspeople to raise capital.
- Farmers – One gap worth calling out is the viability of farming. While farmers in the region are struggling to break even, they are under increasing pressure to sell their farms to local developers. But where will the food to feed people moving into the region come from? A critical mass of farming is essential for a viable local food system, and therefore new ways must be found to protect farmland—including new forms of local investment in land.
- Education – There’s a need for more education: more education of businesses to strengthen their business models, improve their business skills, and take advantage of available sources of capital; and more education of investors to take advantage of available local investments.
- New Markets Tax Credits – While providers of NMTCs are available in WNY, they are not as strong as on the coasts.
- Angel Capital – A few angel networks exist, such as Buffalo Angels, Rochester Angels, and Western New York Angels, but they are relatively small, male-dominated, and hard for entrepreneurs to reach.
- Venture Capital – VCs are less present in WNY than on the coasts, and they tend to be uninterested in FFBPs because they believe these businesses are unsexy, heavily regulated, and difficult to scale.
- Equity Opportunities -- Most food businesses are not capital intensive, which limits the opportunities for all kinds of equity investors. This helps explain why most food businesses tend to seek loans or royalty investors.
- Patient Capital – FFBPs often need patient capital, which looks for modest profits over the long-term. Yet few traditional patient capital providers—angels, philanthropists, pension funds—are focused on local FFBPs or patient capital.
- PRIs/MRIs – While there are many active foundations in the region, few are willing to invest their assets locally in program related investments (PRIs) or mission related investments (MRIs).
- Slow Money – Slow Money, a national network of mostly accredited investors supporting FFBPs, does not have much of a presence in WNY.
- Immigrants – Existing programs have a hard time reaching immigrant communities, though an important exception is the Westminster EDI in Buffalo which runs a small-scale incubator in Buffalo that includes several food businesses.

- **Opportunities**

- Tax Credits – New York State or WNY counties could provide tax credits for local investments (Michigan is considering a law like this now). Unlike Opportunity Zone tax credits, which typically are used only by accredited investors, local investment tax credits could apply to all FFBPs and be made available to all investors.
- Patient Capital Funds – Whether or not they are run by government entities, funds that provide patient, long-term loans would be enormously useful to FFBPs. Examples of these kinds of funds serving local food businesses are PV Grows in Western Massachusetts and the Fair Food Fund in Michigan.
- Government Funds – County and local governments could support patient capital funds for FFBPs with the creative use of municipal bonds. Issuing bonds locally and in smaller denominations, might enable grassroots investors to participate.
- Loan Loss Reserves – Governments, businesses, foundations, and accredited investors could stimulate FFBP lending is by placing funds into banks and credit unions as guarantees.
- Partnerships – Many of the above ideas could become reality if larger partnerships are formed among government agencies, anchor institutions, banks, and foundations. This kind of partnership has been critical in mobilizing a critical mass of support for revitalizing the metro region surrounding Cleveland, Ohio.
- Crowdfunding – Very simple, low-cost interventions can help to greatly increase the level of grassroots investments in FFBPs.
- New Ownership Models – New ownership models can provide new investment opportunities for local investors. For example, producer cooperatives enable groups of local businesses, whether grocery stores or farms, to achieve higher economies of scale. Community land trusts can lower the cost of land for new farmers.
- Social Impact Bonds – One barely used mechanism to support FFBPs is social impact bonds, where private bondholders make an initial investment for a social objective (say, lower childhood obesity), and the government pays the bondholders for the long-term savings (say, in avoided health-care costs) at a later time.
- Regional Branding – There has been much talk around regional branding to facilitate local purchasing. But the same concept also could facilitate local investing.

- **Threats**

- Crumbling Infrastructure – Like other parts of the United States, Western NY faces massive infrastructure challenges. Old systems like roads, bridges, and tunnels that facilitate commerce need upgrades. New systems like high-speed internet have yet to penetrate rural and inner-city pockets of Western NY.
- Securities Regulations – New York State has one of the most aggressive securities regulatory environments in the County. Efforts to make grassroots investment easier, for example, are likely to run into resistance from securities regulators.
- Banking Consolidation – For more than a generation, interstate and international banks have been merging, consolidating, and growing, at the expense of community banks. A natural consequence is that lending to local business is becoming rarer.
- Subsidies – Subsidies, especially those for economic development, favor large, global businesses that are largely disconnected from those needed to expand the local food system

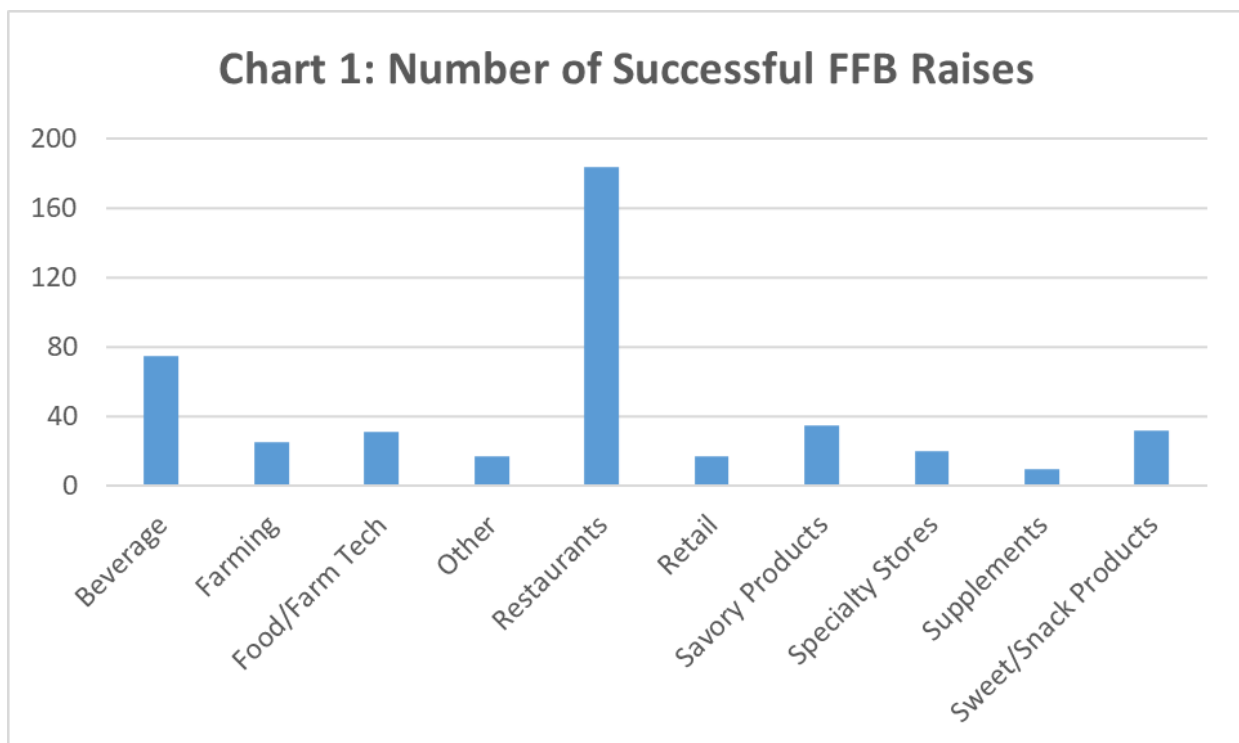
APPENDIX E: Food and Farming Business Crowdfunding Analysis

National investment crowdfunding was legalized in 2016 (under Title III of the JOBS Act of 2012) and has expanded dramatically in the years since. According to Crowdfund Capital Advisors, as of June 2022, 4,972 companies have raised \$1.4 billion from 1.4 million grassroots investors. The average successful raise is \$344,000. These companies have yielded 192,712 jobs. But how well has this capital-raising tool served food and farming businesses (FFBs)? To answer this question, the SCALE team performed a deep dive into the data and this Appendix presents our findings.

We reviewed the crowdfunding FFB transactions from 2016-October 2021. In total we found 446 successful FFB raises out of a total of 632 filed, which reflects a success rate of 71%. The remaining 29% either did not meet their minimum funding target or withdrew their offerings for unknown reasons. Across all transactions, the average amount raised was approximately \$255,000. Compared to all crowdfunding transactions, FFBs had a relatively higher success rate and slightly lower average raise.

In Western New York (WNY), however, there was just one successful FFB offering: One Roq Spirits in Buffalo raised \$850,212 in early 2021. By population, if WNY were using crowdfunding as much as, say, California, there should have been more than five offerings. WNY FFBs, in other words, have barely begun to take advantage of this opportunity.

We categorized the data collected according to the North American Industry Classification System (NAICS) and then ordered the categories into ten broader categories as depicted in Chart 1 below. We show the exact NAICS composition of each category in Chart 2. Restaurants is the most numerous and includes bakeries, caterers, drinking places (namely traditional bars, and excluding breweries and wineries), pop-ups and food trucks, and cafes, along with traditional full- and limited-service restaurants. Beverages is the second largest category, comprising breweries, wineries, and coffee roasters.



¹ https://crowdfundcapitaladvisors.com/cclear_public/

² Special thanks to Otis Pitney and to Crowdfund Capital Advisors for helping to develop and analyze these data.

Chart 2: NAICS Categories in Each FFB Category

Beverage

Beer and Ale Merchant Wholesalers
Breweries
Coffee and Tea Manufacturing
Soft Drink Manufacturing
Wine and Distilled Beverage Wholesalers

Farming

All Other Miscellaneous Crop Farming
Broilers and Other Meat Type Chicken Production
Farm Management Services
Farm Supplies Merchant Wholesalers
Flower, Nursery Stock Wholesalers
Nursery and Tree Production
Other Farm Product Raw Material Wholesalers
Other Food Crops Grown Under Cover
Other Vegetable and Melon Farming
Soil Preparation, Planting, and Cultivating

Food/Farm Tech

Farm and Garden Equipment Merchant Wholesalers
Farm Machinery and Equipment Manufacturing
Food Product Machinery Manufacturing
Lawn, Garden, and Garden Tractors Equipment
Software Publishers

Other

All Other Personal Services
Electronic Shopping and Mail-Order Houses
Community Food Services
Compost Manufacturing
Lessors of Nonfinancial Intangible Assets Local
Messengers and Local Delivery
Media Streaming Services & Social Networks
Other Technical and Trade Schools

Restaurants

Commercial Bakeries
Caterers
Drinking Places (Alcoholic Beverages)
Full-Service Restaurants
Limited-Service Restaurants
Mobile Food Services
Snack and Nonalcoholic Beverage Bars

Retail

Beer, Wine, and Liquor Stores
Convenience Stores
Lessors of Other Real Estate Property
Supermarkets and Other Grocery Stores
Tobacco, Electronic Cigarette, and Other Smoking Supplies Retailers
Vending Machine Operators

Savory Products

Dog and Cat Food Manufacturing
Dried and Dehydrated Food Manufacturing
Fresh Fruit and Vegetable Merchant Wholesalers
Frozen Fruit, Juice, and Vegetable Manufacturing
Frozen Specialty Food Manufacturing
Fruit and Vegetable Canning
Meat and Meat Product Merchant Wholesalers
Meat Processed from Carcasses
Packaged Frozen Food Merchant Wholesalers
Perishable Prepared Food Manufacturing
Seafood Product Preparation and Packaging
Specialty Canning
Spice and Extract Manufacturing

Supplements

Drugs and Druggists' Sundries Merchant Wholesalers
Food (Health) Supplement Stores
Medicinal and Botanical Manufacturing

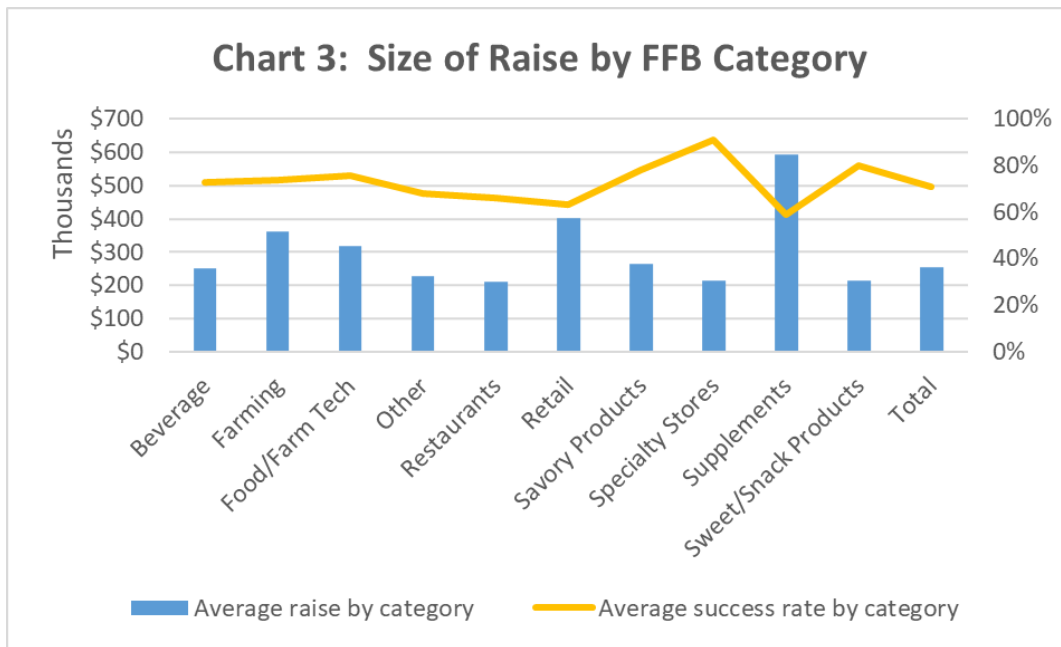
Specialty Stores

All Other Miscellaneous Food Manufacturing
All Other Specialty Food Retailers

Sweet/Snack Products

Chocolate and Confectionery Manufacturing
Confectionery and Nut Retailers
Confectionery Merchant Wholesalers
Cookie and Cracker Manufacturing
Ice Cream and Frozen Dessert Manufacturing
Mayonnaise, Dressing, and Sauce Manufacturing
Other Grocery and Related Products Merchant Wholesalers
Other Snack Food Manufacturing

Chart 3 shows that the average raise by category varied widely from roughly \$200,000 to \$600,000. Farming, Food/Farm Tech, Retail and Supplements were relatively larger, most notably Supplements, which was driven by a handful of very large vitamin and cognitive performance product transactions. Average success rates by industry were all approximately in the range of 60-80%. Specialty Stores, which included Vegan, Ethnic, and/or Organic food stores, exceeded the 80% success hurdle.



In Chart 4 we segment the data by region. It shows that the number of raises was markedly lower in the Midwest. Texas was a particularly strong performer (62 successful raises) and is included in the South region. Other states of relative note were (in successful raises): Massachusetts (30 successful raises), New York (32), Pennsylvania (38), and California (93). Chart 7 shows the exact breakdown by state.

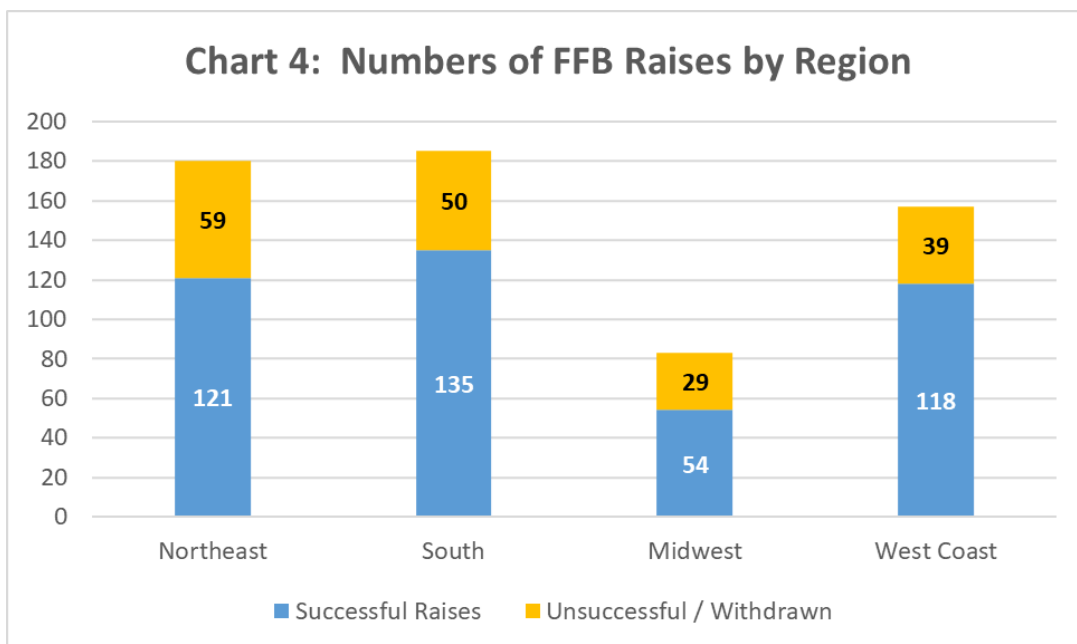


Chart 5 shows the size of successful FFB raises by region. The average raised was significantly higher in the West Coast region than in the other regions. We note that the average success rate did not vary significantly across regions.

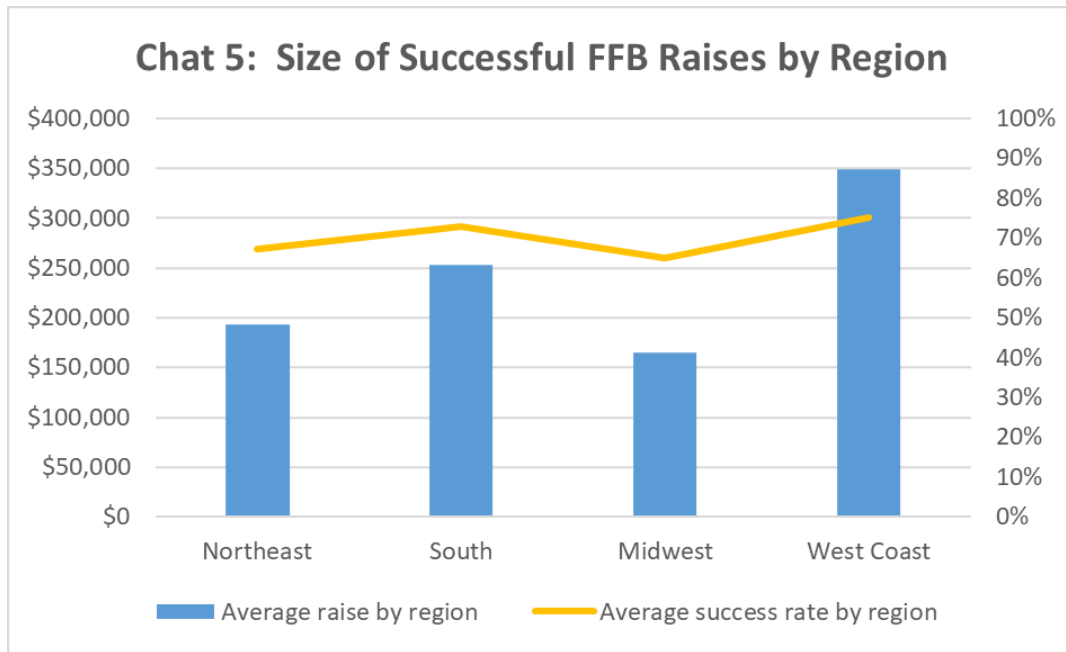
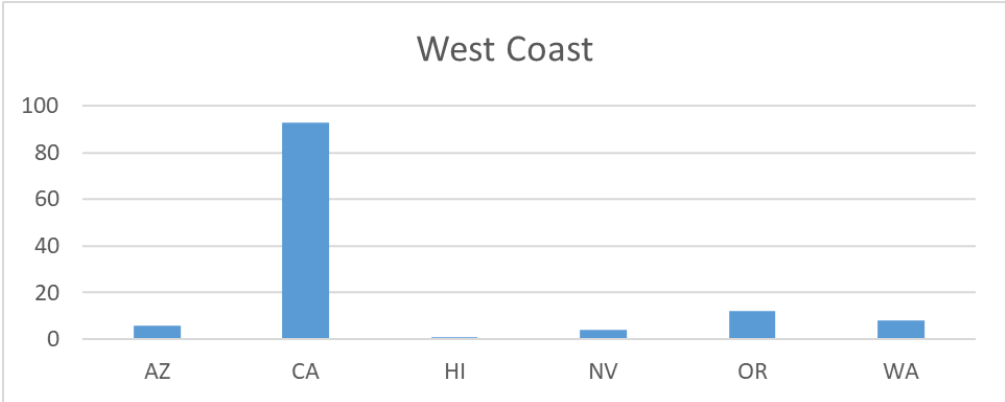
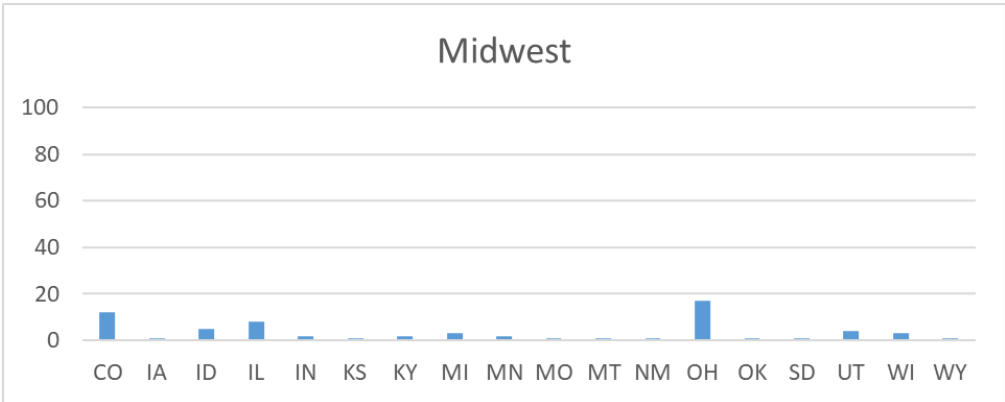
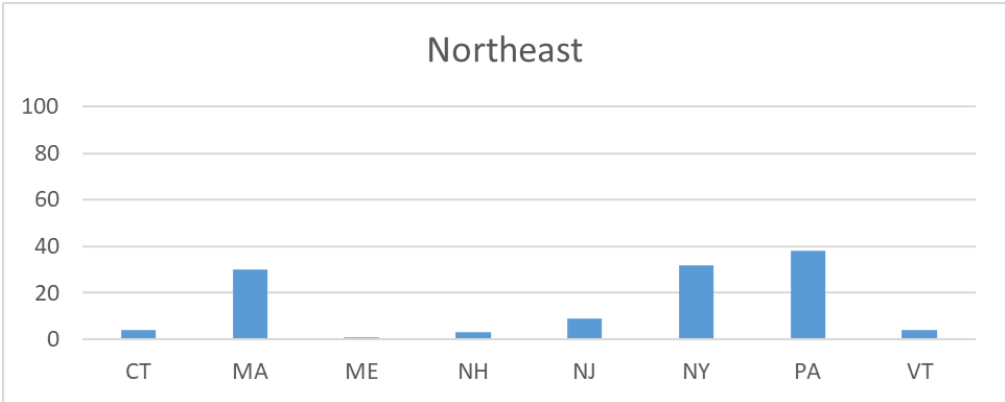
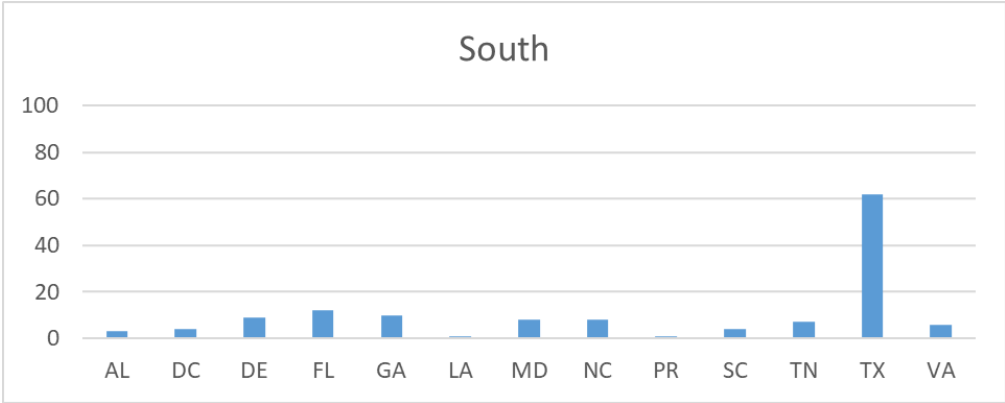


Chart 6, below, details which states are included in each region.

Chart 6: State Composition in Each Region

Northeast	South	Midwest	West Coast
Connecticut	Alabama	Colorado	Arizona
Maine	Delaware	Idaho	California
Massachusetts	District of Columbia	Illinois	Hawaii
New Hampshire	Florida	Indiana	Nevada
New Jersey	Georgia	Iowa	Oregon
New York	Louisiana	Kansas	Washington
Pennsylvania	Maryland	Kentucky	
Vermont	North Carolina	Michigan	
	Puerto Rico	Minnesota	
	South Carolina	Missouri	
	Tennessee	Montana	
	Texas	New Mexico	
	Virginia	Ohio	
		Oklahoma	
		South Dakota	
		Utah	
		Wisconsin	
		Wyoming	

Chart 7: Successful Raises by State In Each Region



APPENDIX F: Immediately Actionable Recommendations

A Sampling from SCALE's Broader Recommendations

The list below provides a sampling of 'actionable recommendations', that is, those that are ready to begin implementation immediately or within the first 6 months to a year following completion of phase one of this project. They are drawn from the five topical groupings of recommendations; details and specific steps supporting all of these actionable items can be found in the Recommendations section of the full report. Note: In the full set of recommendations, the section on the organizational infrastructure needed to carry this work forward, is for the most part actionable in its entirety, so nothing from that group of recommendations is included here.

Access, Equity, and Sovereignty

The bulk of these recommendations center on opportunities for funders to most effectively make racial equity an integral part by building the capacity of FFOWNY as a collaborative initiative, intentionally leading food and racial equity work in the region. Greater detail can be found for each of these in the Recommendations section of the full report. Additionally, actionable steps related to JEDI and equity are delineated in the Organizational Infrastructure section of the recommendations.

Working with a reconstituted Access, Equity, and Sovereignty Working Group, project staff should:

1. Establish Food and Racial Equity as an integral part of the Food Future WNY Initiative that advances the Initiative's collective understanding and work on food and racial equity by making a public commitment to food and racial equity and forming a Food and Racial Equity Steering Committee. This Steering Committee will explore and make recommendations related to formation of a permanent Food and Racial Equity Council, either within or affiliated with the RC.
2. Support East Buffalo - In acknowledgment of the racist terrorist attack in Buffalo, establish a food and racial equity fund, within the broader FFOWNY Fund, to equip BIPOC leaders with the skills to advance racial equity. This dedicated fund should also support Black-led groups working to end food apartheid and violence or provide mental health resources on Buffalo's East Side (list developed by the Buffalo Food Equity Network).
3. Invest in 1-2 Intermediary Organizations to bring together regional partners, stakeholders and other Food System Actors interested in securing long-term stewardship of land together for six convenings over the next year. Intermediaries should be entities that have distinctly different roles in the initiative such as Grassroot Gardens, The Public Land for Public good Workgroup at the Partnership for Public Good, and Cooperation Buffalo. The Genesee Land Trust and other land conservancies might also be involved.
4. Initiate the development of Healthy Food Priority Areas (HFPAs) in urban, peri-urban and rural areas through a community engagement process lead by the AES Work Group and supported by project staff. At the outset, this should include the creation of a series of maps determining HFPAs across the different geographies (with assistance from the UB Food Lab) as well as development of culturally relevant health communication strategies. See Food, Health, and Community Wealth for details of this recommendation.
5. Work with all workgroups to collectively develop proposals that make a significant investment in a wealth creation value chain approach rather than extraction of wealth and exploitation of resources to which poor rural and urban areas have long been subjected. See Food, Health, and Community Wealth for details of this recommendation.
6. Organize a regional Food Sovereignty partnership in the Fall of 2022, to highlight and support the work of Michael Snyder of Gakwi:yo:h Farms and Marlene Wakefield of the Seneca Nation of Indians. The Intertribal Ag Council, who has worked with Marlene on advocacy and funding opportunities, should also be involved at this initial stage, during which other food sovereignty leaders will be identified and engaged.
7. Create a webinar series on Prioritizing BIPOC Food System Actors across the WNY region with speakers from around the country to leverage resources, time and experience.

Farmers

1. In the winter of 2022/23, NYSAWG should convene two to three subregional gatherings of farmers and food entrepreneurs who sell DTC (Direct to Consumer) along with marketing staff from CCE and NY Ag and Markets to develop a detailed plan and timeline for a regional 'buy local' food campaign, with the intention to initiate the campaign by June of 2023. This can and should build upon other buy local efforts underway in the region, including STW's initiative and the Know Your Farmer Facebook group.
2. Work with and support the three primary e-commerce food platforms in the region – Fresh Fix, Produce Peddlers and Farm Drop – to expand ease of access and volumes of sales for farmers through these platforms. We encourage a fall, 2022 virtual gathering between these three businesses and current and potential farmer suppliers to identify opportunities, challenges and specific crops and products for which there is unmet demand.
3. In the fall of 2022, convene farmers interested in exploring cooperative or joint marketing with leaders of the region's three main food hubs, Eden Valley Growers, the Western New York Food Hub and Headwater to examine whether current aggregation and marketing systems are meeting the needs of smaller, newer and limited resource farmers.
4. Work with the Greater Buffalo Urban Growers (GBUG) network to facilitate meetings with key staff and elected leaders in Buffalo to increase the city's commitment to urban farming. This effort should be based upon the priorities and strategies already developed by GBUG, with focus on using FFWNY's collective voice to better influence key Buffalo officials.
5. Within the larger regional Food and Farm Investment fund, dedicate a stream of funds for investment in critical on-farm infrastructure, particularly for newer, limited resource and BIPOC farmers. We recommend that this be in the form of a cost-share, with the proportion of funds provided by the farmer scaled to their capacity. Eligible infrastructure should include both production enhancing equipment, tools and facilities as well as cold storage and other post-harvest handling facilities.
6. Invest in formation of emerging farmer networks to help facilitate peer learning, access to information and reduction of input costs. We recommend focusing on two initially, one being planned by CCE Extension Vegetable Specialist, Robert Hadad, the other emerging from the Farmer Work Group, and specifically Matt Agle.

Markets and Buyers

1. Working with the Markets and Buyers Work Group, NYSAWG should establish a Community of Practice (CoP) that will spearhead efforts to significantly increase values-based food procurement by higher education, hospitals and other anchor institutions in the region. The CoP will facilitate learning among a community of peers, provide technical support, and promote business to business connections. Base funding should be provided by regional funders for the CoP formation and at least the first two years of operations and NYSAWG should work directly with the CoP to identify and secure additional long-term funding.
2. Work with the CCE Harvest NY Farm to Institution staff to build a library of resources that assist food service staff to start and increase the purchasing of local, regional and values-based products. These include existing and new materials such as video presentations, webinars, written materials, resource people and organizations.
3. The RC and NYSAWG should actively work to advance the advocacy efforts of the Good Food Buffalo Coalition and Community Food Advocates to pass the Good Food NY Bill that will amend NYS Municipal law 103 to extend beyond "lowest responsible bidder" in public food procurement and instead promote the values of transparency, racial equity, local economies (geographic preference), environmental sustainability, nutrition, valued workforce, and animal welfare.

4. Invest in Food for the Spirit's collective marketing initiative with Genesee Valley Black Farmers to build their capacity to connect BIPOC farmers with institutional markets, marketing assistance, and other networks of support local and statewide.
5. Working with UB School of Public Health and Health Professions and the recently-formed WNY Mobile Market Network, convene mobile market leaders across the region to foster greater coordination in sourcing, delivery, community coverage, operations and engagement. With the growing number of mobile markets, there is a need for this greater coordination to reduced redundancies and increase the viability of these markets.
6. Provide support to expand the Market Ambassadors program at [Foodlink's Curbside Markets](#) and for them to guide other markets to start an Ambassador program. Market Ambassadors do outreach, help resident access the market, assist with SNAP and WIC and incentives, and much more.

Infrastructure

1. Invest in the Alliance Farm Butchery's farmer member-based meat processing facility, based upon the business plan summary already provided, in order to help them complete their facility and become fully operational. As part of that investment, AFB's owners should agree to work with FFWNY to explore and enable replication of their model in other parts of the region, once sufficient experience has been gained
1. Working with both the Infrastructure and Farmer Work Groups, select two to three pilot sub-hubs for investment in 2022/2023, testing the effectiveness of this model in increasing farmer access to larger and more varied markets than are currently available to them. Particular attention should be paid to the location of the sub-hubs in order to ensure relatively easy access to the largest number of farmers likely to utilize them. We suggest that Brigiotta's Produce, which is moving forward with plans to build out a sub-hub intended to increase market access for small farmers, should be among the pilot efforts supported
2. Working with the Massachusetts Avenue Project, the Greater Buffalo Urban Growers Network, the Taproot Collective in Rochester and the Access, Equity and Sovereignty Work Group, invest in at least one sub-hub facility in an underserved community of both Buffalo and Rochester, with the goal of increasing access to healthy foods while also providing additional market opportunities for urban and peri-urban farms.
3. Work with and support the three primary e-commerce food platforms in the region - Fresh Fix, Produce Peddlers and Farm Drop - to expand ease of access and volumes of sales for farmers through these platforms. We encourage a fall, 2022 virtual gathering between these three businesses and current and potential farmer suppliers to identify opportunities, challenges and specific crops and products for which there is unmet demand
4. Help link communities with current and emerging 'community kitchens', such as the newly completed kitchen at Matt Urban Center, to help increase access to healthy local foods. This 'linking' may take the form of introductory meetings and tours of the facilities, followed by development of schedules of use for community partners
5. Invest in promising farm incubators focused on BIPOC and limited resource farmers, such as Alexander Wright's Blegacy Farms. Investment could include critical infrastructure needed on a working farm (irrigation, fencing, season extension, storage, cooler space, etc); purchase of basic but essential tools and small farm equipment; and a modest 'working capital fund' available to help start-up farmers with purchase of seeds, plants, compost, etc

Finance and Investment

Working with reconstituted Finance Working Group, project staff should:

- *Networking* - Develop representatives throughout the region (e.g., in Cornell Extension) who are already working with FFBCs, make sure they are aware of the project's expanding resources for FFBCs seeking capital.
- *Webinar Series* - Develop a regularly webinar series featuring FFBCs who have successfully raised capital and create a library of these webinars to inform and inspire other FFBCs.
- *Food Fund* - To begin the process of launching a regional fund support FFBCs, form an advisory committee populated with high-level, widely respected regional leaders. Develop partnerships with anchor institutions in the region (universities, government agencies, sports teams, hospitals) that will encourage their employees to become investors in the fund.
- *Short Term Financing* - Since formation of a fund like this takes time, encourage interested philanthropists and foundations in the region to create ad-hoc pools of capital to support FFBCs and related community-based organizations with urgent capital needs. Alternatively, funders can use existing structures where relevant such as the Black Farmer Fund (which serves the entire Northeast) or the Fair Food Fund (which currently serves Michigan). These pools should combine grant, mission-related investments, and program-related investments.
- *Newsletter* - Create a newsletter linked to the Food Future WNY website listing investment opportunities in FFBCs as a way of building up a network of grassroots investors in the region. Encourage these subscribers not only to invest in specific FFBCs but also in emerging FFBCs through the Black Farmer Fund.
- *Potlucks* - Sponsor monthly potluck dinners across the region introducing FFBCs to interested local investors, with special attention to create these social networks in rural and BIPOC communities.

APPENDIX G: Outline of Communications Plan for Phase 2

The current communications plan is geared internally towards RAC and WG members to support cohesive and united message. This approach will continue to be valuable as the RC is revised and expanded and the Work Groups continued. The initiative will also benefit from an external facing communications plan implemented later in 2022.

- The name Food Future WNY should be retained as the main identifier of this initiative.
- Food Future WNY should be positioned as a program or initiative of NYSAWG. This would signal that this work is led by organizations and stakeholders in the region and not directed by the funding community. It would also make it more attractive to outside funding sources such as DAFs, nationally focused foundations, and government competitive grants. Acknowledging that its origin the Moving Forward Together collaborative however is important in recognition of their contribution to its founding and so as to position it for future support by its members.
- An external facing communications plan should be developed building on the current plan and implemented in the fall of 2022. A communications consultant should be contracted to develop the plan and guide the initial stages of implementation. We are offering our suggestions on elements of the plan for consideration by the communications consultant and NYSAWG:

Function

- The communications plan should be in service to the priority recommendations resulting from phase one. It should seek to increase awareness of the initiative and foster changes in behavior among regional stakeholders that help Food Future WNY achieve its priority goals.
- Key audiences will vary depending on each objective/recommendation.

Messages

- The brand should represent thoughtful, informed and strategic action intended to foster resilient community and economic development rooted in equitable, healthy and environmentally sound food and farming systems.
- We can succeed when we work in coordination with our neighbors - Connecting with like-minded organizations and individuals across the region and coordinating action steps is essential for fostering change in the food system.
- Poverty is the root of food insecurity, and poverty is the result of inequities in our society based on race, gender, and education level. To address food insecurity and hunger we need to focus on livable wages, wealth creation, job training and career pathways and health care and coverage.
- Financially viable local and regional farms are the foundation of a resilient food system.
- Racial inequities are at the root of food insecurity and only in addressing these will we be able to build a resilient and healthy food and farming system.

Communications Channels

- The RC, Work Group members, funders supporting the work and NYSAWG staff are and will continue to be key spoke people for the initiative. They should be trained for this role and provided any materials to help them represent the work current and new audiences.
- Expanding and maintaining FoodFuture.org will help people stay connected despite the size of the nine-county region and the range of sectors involved.
- Social Media is an important tool but just one of several means of communications
- Facebook is an important platform for expanding engagement with rural stakeholders and the current page used by NYSAW should be made a priority.
- Instagram, LinkedIn, and Twitter should be considered to promote and report from gatherings, field visits, and other events. Food Future WNY participants should be trained in these tools and supported in their use.
- A launch event held in the region late in 2022 will help announce and establish Food Future WNY as a long-term initiative with broad support and participation. Securing participation from respected food systems leaders in the region, national thought leaders, funders, and regional and state level politicians will be important.

APPENDIX H: Suggested ideas for a Regional Local Foods Promotion Campaign

The following ideas are offered by SCALE President, Anthony Flaccavento, based upon his experiences in south-west Virginia and other rural communities in the United States. It is our hope that these will help farmers and their advocates plan, organize and launch a regional “buy local” campaign around food and farm products.

Background

Sales of ‘local foods’ have grown dramatically over the past thirty years across much of the United States, including in rural communities. From our surveys and farmer and buyer interviews in the WNYFSI project, this is clearly true for much of the WNY region as well. Nevertheless, in the region and the nation as a whole, many farmers and local foods outlets (farmers markets, CSAs, farm stands, etc) have also begun to see a plateau in their sales, beginning as far back as ten years ago. This was corroborated in part by a 2015 USDA study that showed a 32% increase in DTC (Direct to Consumer) sales from 2002 to 2007, but no increase in aggregate sales from 2007 to 2012.

It is also the case that the number of farmers markets, the most conspicuous ‘face’ of local foods, grew steadily throughout that period, and have continued to do so for the past decade, though at a slower pace. Looked at as a whole, the opportunities to buy local foods have increased faster than the sales themselves, meaning that farmers have to keep expanding their market outlets just to maintain their sales level, let alone to increase it.

Though there was a resurgence of sales at farmers markets and other DTC outlets during the first year or so of the pandemic, it is reasonable to conclude that the number of American consumers choosing local produce, meats, dairy and other items, and the amounts they purchase have both leveled off in many places. From our investigation, this clearly seems to be the case in the WNY region as well.

From experience launching and building a ‘local foods movement’ in the Appalachian parts of Virginia and Tennessee, as well as comparable experiences in places like rural Kansas, southwestern Oregon, West Virginia and elsewhere, we believe that there nevertheless remains substantial potential for DTC sales growth, as well as growth through so-called intermediaries like food hubs, e-commerce platforms, etc. This short paper offers a few experience-tested ideas that might be considered as part of a strategy to reinvigorate and expand the demand for local foods in WNY.

Why have sales of local foods plateaued?

We believe that there are three basic reasons for this. First, American consumers have become accustomed, if not addicted to convenience. From on-line shopping to 24/7 big box outlets, most of us have an extraordinary array of choices at our fingertips or nearby (We recognize of course that there are glaring exceptions to this in WNY and elsewhere, but as a general rule this holds true for the majority of people). Surveys show that for most shoppers, convenience is one of their top priorities in selecting where they shop and what they buy. Price is also important, of course, but well below convenience as a factor. So, while local foods have become more available, more convenient over the past twenty years, that expansion of options has not kept pace with the dizzying growth of outlets in the wider food marketplace.

Second, while the number of people interested in or preferring locally sourced foods has grown substantially over time, this group too appears to have reached a plateau, or at least slowed in its expansion. Farmers know that many people who shop at their farm stands, CSAs or farmers markets are an enthusiastic, committed bunch. But their numbers remain a very small part of the wider population, even narrowing that down to middle income and higher income folks. Put simply, most people who could comfortably afford to buy local foods are not doing so with any regularity.

The third basic reason for the slowdown in expansion of local foods sales pertains to the body of local foods shoppers themselves. While these folks frequent farmers markets and other local foods outlets much more than the wider population, the reality is that the vast majority of them do only a small portion of their shopping at such places. Most buy small amounts of items from their local farmers, continuing to make the great majority of their purchases at supermarkets or other largely non-local venues. It's great to have a lot of foot traffic at a local market; but when shoppers purchase a muffin, a pound of tomatoes and a half dozen ears of sweet corn, and then go 'grocery shopping' elsewhere, local farmers lose out.

Ideas and strategies for a regional local foods promotion campaign

The following ideas and examples are based upon the three underlying problems discussed above.

1. Primary target audience for campaign – This will vary in different parts of the WNY region, depending both upon the local population demographics and the existing or planned local foods outlets. Overall, however, **we suggest that a regional local food promotion campaign focus on what we have come to call the vaguely concerned and sporadically motivated consumer.** This group crosses income levels and other demographic characteristics. They live in rural, urban and suburban communities. What ties them together is their perceived need for convenience and fast transactions when shopping, and their reluctance to try new market outlets, especially if they are not conspicuous and easily accessed. Targeting this group means making local foods outlets more obvious, more convenient and more satisfying when tried. All of these are addressed below.

Strategies to reach this group:

- a. Strengthen existing local foods outlets, particularly farmers markets, farm stands, food co-ops and other specialty grocers, as well as food-focused ecommerce outlets, in order to increase their product diversity, product quality and in some cases product quantities (ie, so that they don't 'run out of stuff' before the market is closed). Because there is always a 'chicken and egg' dilemma between buyers and sellers, this may require some support to both farmers and market outlets for them to take the risk to 'stock their shelves' with more, more diverse and better quality local foods.
- b. As needed and acceptable, consider consolidation of some very small farmers markets that are in close proximity to one another and, if combined, might better serve both shoppers and vendors.
- c. Assume that the vast majority of vaguely concerned and sporadically motivated shoppers are not foodies. They are less experimental about what they eat, and therefore, what they buy. Hence, farmers and the outlets through which they sell need to ensure a substantial selection of 'everyday foods', understanding that this will vary from one place and community to another. But put simply, less kohlrabi, more beans; less wild pheasant, more ground beef.
- d. Build upon existing print and electronic resources to jointly promote and advertise ALL local foods outlets, including farmers markets, farmstands, CSAs (that are seeking more members), e-commerce outlets focused on local foods, and grocers and retailers that specialize in or carry substantial quantities of local foods. This joint promotion can take many forms including maps, operating schedules (who is open on Monday, Tuesday, etc, and at what hours), and a range of seasonal and special promotions.
- e. Reach out beyond the 'food community' with presentations (using the resources developed above) to Kiwanis, Rotary and other mainstream civic organizations, as well as local churches and neighborhood groups. This can be done largely by volunteers, including farmers themselves, as much of this outreach can and should be done in the fall and winter, in anticipation of the new season. The outreach and presentations should be simple and straight forward, including a bit about the advantages of buying local, along with concise and easy-to-follow information and materials about nearby local food outlets. This should be pitched as an opportunity, rather than a moralizing argument about why one 'should' buy local foods.

2. Second target audience – people who currently shop relatively regularly at local foods outlets, but dramatically underspend when there, less out of price concerns than long standing habits. In many respects, this group is easier to impact because they already know where local foods outlets are and have shown at least some willingness to attend them regularly.

Strategies to reach this group:

- a. Work with a small number of farmers markets to organize a “Make the Market Your Supermarket!” campaign. The series of 1 – 2 minute videos developed and utilized by SCALE and the Abingdon (VA) farmers markets can serve as a template to help develop something comparable, adapted to the specific markets. These are available on the Food Future WNY website, or by request to Anthony Flaccavento.
 - b. Take stock of the current product mix available at local farmers markets, farm stands and similar outlets, in order to pinpoint what is missing or in short supply at these markets. Once these product gaps have been identified, existing vendors should be encouraged to fill some of them, while new vendors could also be recruited who produce such items. The wider the array of products available, the more likely people will begin to ‘make the market their supermarket’.
 - c. If customer surveys have not recently been done at farmers markets, farm stands and through e-commerce food platforms, simple surveys should be done with customers to determine why they shop locally (or at a specific market), what they would like to see more of (in terms of products), and what it would take for them to do a larger portion of their grocery shopping with local farms/outlets. At farmers markets and farm stands, the Rapid Market Assessment, or “Dot survey” approach is an excellent way to gather this kind of information. This will need to be adapted for use on the electronic platforms.
 - d. Either individually or across multiple markets – farmers markets, farm stands in particular – a comparison of pricing between these markets and nearby supermarkets should be considered in an effort to promote the relative affordability of buying local. A study of 25 farmers markets in six states in the Southeast, done by SCALE, Inc, could be used and adapted for markets in WNY: [Is Local Food Affordable for Ordinary Folks?](#)
 - e. While there are a number of restaurants in the WNY region who do a substantial amount of local food purchasing, the majority do not. There are multiple reasons for this to be sure, but one is very likely the perception that they “can’t afford it”. SCALE developed the [Local Food Cost Calculator](#) to help demonstrate the affordability of local foods on restaurant menus, and we encourage its use in WNY as well, part of a larger research effort, “Putting Local Food on the Menu”, the calculator can be downloaded for use.
3. Third target audience – New Americans, ethnic communities, and working people of modest means. The strategy to reach these communities is similar, in that convenience and ease/speed of transaction is also very important to this group. However, affordability is generally going to be of equal or greater importance to this group, necessitating strategies to mitigate the cost of local foods without hurting the farmers and producers themselves.

Strategies to reach this group:

- a. Encourage production of culturally appropriate/traditional foods by farmers at Providence Farm Collective, as well as other farmers and/or farmer networks with links to specific ethnic or immigrant communities.
 - i. Short, simple surveys might be useful in determining which of these foods are most in demand and in approximately what quantities, before farmers are encouraged to produce them.
- b. Work with farmers markets in the region who are not currently accepting SNAP, as well as those that accept SNAP but do not have “double bucks” programs to help get these operational at as many markets as possible.

- i. Build the base of lower income consumers at markets (farmers markets, farm stands and farm-based retail, etc) through joint outreach and promotion with local health departments, social service providers and others community organizations working with this population
- c. Explore the possibility of subsidized CSAs through which the cost of a share is lowered substantially utilizing funds from philanthropy as well as middle and upper income CSA customers.

APPENDIX I: Proposal for Launching and Testing of ‘Sub-hubs’

Overview and Context

According to SCALE’s survey of farmers in WNY, the majority are interested in finding or accessing new and better markets. This is true of those who are primarily Direct-to-Consumer (DTC) producers as well as those more accustomed to selling wholesale or to larger buyers. The sub-hub model described below is one strategy for creating additional market opportunities for small to mid-size farmers. It has several potential advantages, as well as some potential problems or shortcomings, for both urban and rural based farmers.

The recommended pilot project models described below would each require a ‘host’ business or entity who has sufficient infrastructure and management capacity to take on the sub-hub. This might be an established farm, farm retail store, processing business, food pantry, community based organization, etc.

Advantages include:

- Relative ease, from the farmers perspective, of accessing new and larger markets, since sub-hub facilities would be located near clusters of interested farmers
- In most of the models under consideration, any and all product farmers delivered to the sub-hub would be pre-sold, reducing the farmers’ risk. The pre-sale would be done by an existing food hub, food distribution business or farmer network
- From a food hub/distributor point of view, the sub-hub will greatly reduce their time and cost in accessing local products, increasing their efficiency, reducing food miles and increasing their access to more and more diverse local foods
- From the perspective of urban farmers, sub-hubs should strengthen their ability, and efficiency, in meeting the demand of larger buyers that they cannot fulfill individually. This might take the form of a larger multi-farm CSA, a co-op like the African Heritage Food Co-op, or even smaller institutional buyers
- Urban sub-hubs might also increase purchase of local food, particularly produce as part of the Healthy Corner Store initiative, though pricing might limit this

Potential risks and problems include:

- Pricing: Most small to mid-size farmers, certainly including urban producers, cannot make money selling at wholesale prices. Thus the sub-hubs and their distribution and market partners, would have to be able and willing to pay significantly above standard wholesale pricing, perhaps mid-way between wholesale and retail
- Distance to transport product could be an issue, depending upon where the sub-hub facilities are located. If the sub-hub strategy proves successful, it should steadily expand the number of sub-hubs, reducing transport miles for more and more farmers
- Rejection of product: Working with the end buyer, whether Brigiotta’s Produce, Headwater, or a large CSA customer base, clear standards for product quality will surely be established, reducing the risk of rejection. Nevertheless, product standards, especially for fruits and vegetables are not always exact and farmers and end-buyers will need to be in regular communication to minimize rejection or loss of product.
 - Note that while standards for meats are more precise and perishability is not an issue (assuming the sub-hubs take only frozen meat), quality can still vary considerably, depending upon how the animals were raised and finished, hanging time, handling by the processor, etc
- Breakdown of facilities, particularly problems with coolers or freezers. This is always a risk, so a clear understanding of who bears that risk, and how to compensate for lost product will need to be established

Description of three specific food hub models

In order to 'test' the efficacy of sub-hubs in different settings, and for different users, we recommend that the initial phase of the project be undertaken following three models.

1. Urban model - located in the City of Buffalo, undertaken in coordination with an existing hub at Massachusetts Ave Project

The urban sub-hub would be designed primarily for urban farmers, though if there is sufficient capacity and demand, small farmers on the outskirts of the city might also utilize the facility. The intent of this sub-hub would be twofold: Increasing access to healthy local foods in under-resourced communities in Buffalo; and expanding market access for urban farmers through aggregation of small volumes into larger volumes. Improved quality and shelf life of produce would be another benefit for producers and consumers alike.

Some of the elements of the urban sub-hub would likely include:

- A point of sale/retail element, whether as a pick-up point for CSA's or on-site farmers market, managed by the host business. Decisions about the 'custody' of the product (pre-sold, consignment, other) would need to be clarified in advance
- Catered toward smaller farmers (non-wholesale) needing closer to retail pricing
- Could make use of existing infrastructure, whether at Matt Urban Center, the Niagara Frontier Food Terminal or other established venues
- Host organization likely to be community based organization involved with food access/food sovereignty
- Funding could be allocated to provide underserved farmers with grant opportunities for small cooling infrastructure

2. Single Distributor Rural model - based in or near (eg, Wyoming Co) the Southern Tier

This model is already underway in its development, led by Jim Galbatto and Brigiotta's Produce. The intent is to increase small farmer access to the wide range of markets Brigiotta's supplies, from its own store in Jamestown to the restaurants, schools and other retail accounts they currently serve. Brigiotta's, which already buys from local farmers, is committed to increasing local sourcing and sees the sub-hub as a means to expand its local supplier base considerably, while at the same time, reducing its time and costs associated with picking up directly from farms.

- Because of the wide range of customers Brigiotta's serves, this sub-hub could potentially accommodate both mid-size farmers able to sell profitably at closer to wholesale price, as well as smaller farmers needing closer to retail pricing.
- All product would already be sold once it reaches the subhub (in 'custody' of Brigiotta's)
- Off-season coordinated production planning would be essential to ensure that participating farmers grow the items for which Brigiotta's has a demand, avoiding both shortfalls and gluts. A farmer network would help in facilitating this production planning
- Brigiotta's is adapting current software in order to be able to track and manage inventory
- There would be no fees charged to the producer
- Brigiotta's plans to cover most of the costs of start up, though additional funds might be needed to cover some soft costs, such as the production planning process, as well as enhancing on-farm cooling infrastructure for some farmers

3. **Rural sub-hub linked to multiple distributors, food hubs - probable location between Rochester and Buffalo, potentially in or near Batavia**

The intent and structure of this model would be similar to the Brigiotta's model described above, except that two or more distributors would be using the sub-hub to source more product from local buyers. At the outset, this might include Headwater and Produce Peddlers, with others soon to follow. Having more than one distributor ordering from farmers creates more complexity in managing the product throughput at the sub-hub, and in maintaining the inventory and ensuring products get to the right end-buyer. But it also creates more and more diverse product demand, opening the door to a wider range of farmers.

The ownership of the structure is not yet determined, but it is recommended that this model be farmer-based, with either shared ownership across a network of farmers, or a lead farmer-owner with other farmers contributing modest fees to cover operational costs. A third option, which would reduce risk and cost to farmers, would be for a non-profit - potentially FeedMore - to own the sub-hub, with management of the facility sub-contracted to one of the existing distributors (eg, Headwater)

- As with the Brigiotta's model, all product would be pre-sold by the time of delivery, with no fees charged to farmers. Coordinated production planning would also be necessary in this model.
- Freezer capacity should be considered in order to expand the sub-hub to serve meat producers
- With multiple buyers/distributors utilizing the facility, a clear, simple system for product separation and destination coding (that is, some readily identifiable marks or stickers on boxes/pallets for each of the different buyers).
- Cross docking and sales of product between the established hubs/distributors would also be possible with this sub-hub, though that function should be secondary to bringing additional farmers into the system

If these pilot models prove effective and enhance both market access for farmers and access to healthy local foods for consumers, then in subsequent years they may be expanded into a multi-tier system of subhub 'nodes,' which would be different sized versions of the subhub model (smallest to largest below):

- Coolbots, iceboxes, or some other very small/inexpensive option
- Cross-hub model: Jim describes this as a hybrid between a crossdock and a refrigerated trailer
 - Could be as simple as an old shipping container with a coolbot, etc...
 - Differentiated from a brick-and-mortar building by the volume of goods (brick-and-mortar would be geared toward higher volumes and producers who can sell directly to distributors/aggregators)
- Full build (i.e., existing brick-and-mortar structure converted to cooling space)

APPENDIX J: Summary of Findings from Surveys

WNY Markets and Buyers Survey 2021-2022

The full findings from this survey can be found here: https://www.surveymonkey.com/results/SM-IZbFdJbFtPHn-WTkDZw_2Bf5g_3D_3D/

Results are generally arranged as follows:

1. The subject of the question is listed followed by question number
2. Results or data directly from the survey
3. Bullets that interpret the meaning of the data

N = 44 started survey providing some information. About 21 filled it out completely.

Type of Business Q3

Restaurants 8%, grocery 24%, institutions (schools, university) 27%, and individual responses from a food bank or pantry, home delivery business, vocational academy, camp and retreat center, mix of restaurant-market-wholesaler, veterans organization.

- Range of buyers responded with good representation by grocery, institutions and schools but not all of these completed the survey. Survey proved either too long or too specific for some to continue.
- Did follow up interviews or held meetings with retailers like Wegmans, Tops and Dash's and manufactures like Niagara Dairy Cooperative, Rich's, an apple distributor/processor and held three group meetings with institutional buyers.

Minority Owned Q6

Yes 8%, no 72%, not say 11%, other 14% – public entity or 3 NGO or women owned

- Reflected what we learned from RAC and WGs that BIPOC ownership of food businesses and farms etc. is very limited.

Food Purchasing Budget Q7

42% purchase less than \$250,000 while 17% are between \$250k and 1 million, 22% are \$1-5mill, 8% are \$10-25 mill, and 3% greater than \$100 mill. 3 participants did not know or not applicable.

- Survey represents a range in scale of purchasing and associated preferences/needs at those scales with 42% at under \$250k and 47% above \$250k in annual food budget.

Characterization of Customers Q8

- Pretty equal distribution across low to affluent income to a mix.

Address Food Insecurity Q9

82% say it is important or very important.

- A large majority of respondents are aware of food insecurity and aligned to some degree with the importance of addressing it, whether their organizations are currently taking action in that direction or not (we did not ask about their activities to address food insecurity).

Importance of Local Sourcing Q10

61% said very important, 26% said important. Only 13% said somewhat or not important.

- There is strong interest among these buyers (range of types) which resonates with national trends and stats. 87% said very important or important!

Local Products Desired Q11

Vegetables, dairy and eggs were important to buy from local and regional sources (getting an average rating of 5 out of 5 rating). Fruit and maple syrup 4 out of 5. With value added products and meat/fish/poultry at 3.

Level of buying directly from farmers Q12 (%) and Q13 (\$)

45% of respondents said 10% or less (30% said \$100-500 a week)

- There is some direct farm purchasing among food service and retail buyers but it is relatively low
- There are exceptions with some responses indicating \$500-1,000, \$1,000-5,000 and \$5k-10k and several saying \$10k or more. A few respondents said they purchase 20%, 30% and more than 50% of all food locally. So there is some activity and market.

Challenges with farm direct Q14 (see graph)

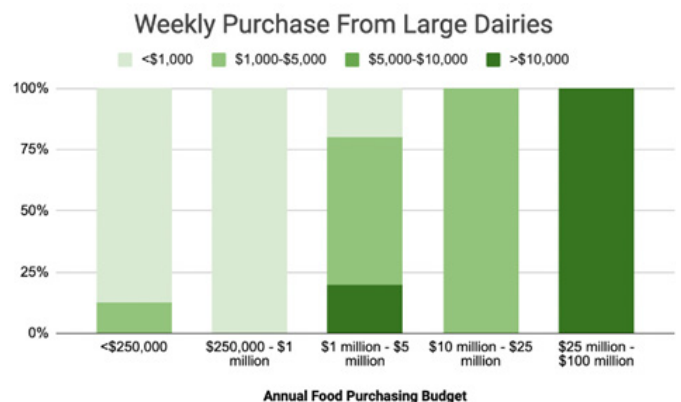
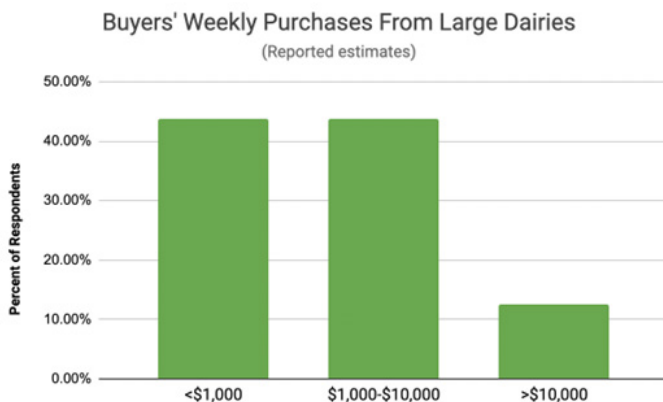


- The short seasons in WNY are an issue for some buyers that want product through the seasons and consistent supply over time.
- A range of other issues all received a rating of 2 (somewhat important) or higher indicating there are issues with direct farm purchasing by wholesale buyers.

Purchases from larger dairies like Upstate Niagara Q15 (see graph correlating by size)

Most respondents said they get some or all dairy from these sources. Most in the \$1,000-2,000 per week range. One respondent is at \$100,000 per week (university). Several did not know the dollar amount but said “a lot” or “all our dairy”. One said all from Pittsford Dairy which is just outside of Rochester.

- Dairy is NYs leading ag product so even though it is local it is also commodified. However, to the credit of buyers there is some allegiance to Upstate Dairy Coop and other regional dairy processors, which are WNY based and have many small and mid-size farm members in the region.



Purchases from Regional Food Hubs Q16 (%) and Q17 (\$)

39% of respondents said 10% purchased or less, while 22% said between 11% and 30% and one indicated more than 50%. One indicated purchasing was between 30-50% during 2020-22 when grants (Nourish NY) supported such purchasing but normally very low. Dollar levels are spread with 19% between \$100-500, 28% between \$501-5,000, 10% are \$5k-10k and 10% more than \$10k per week.

- Food hubs are seen as a reliable source of local products, however, most only buy a relatively low percentage of their total food from them, with a few exceptions.
- We know from other sources that EVG and Headwater are significant businesses with good markets both retail and institutional and others.
- Food hubs are well positioned to work with buyers that have grant funds that require local sourcing. Nourish NY has become a permanent program and its budget has bipartisan support.

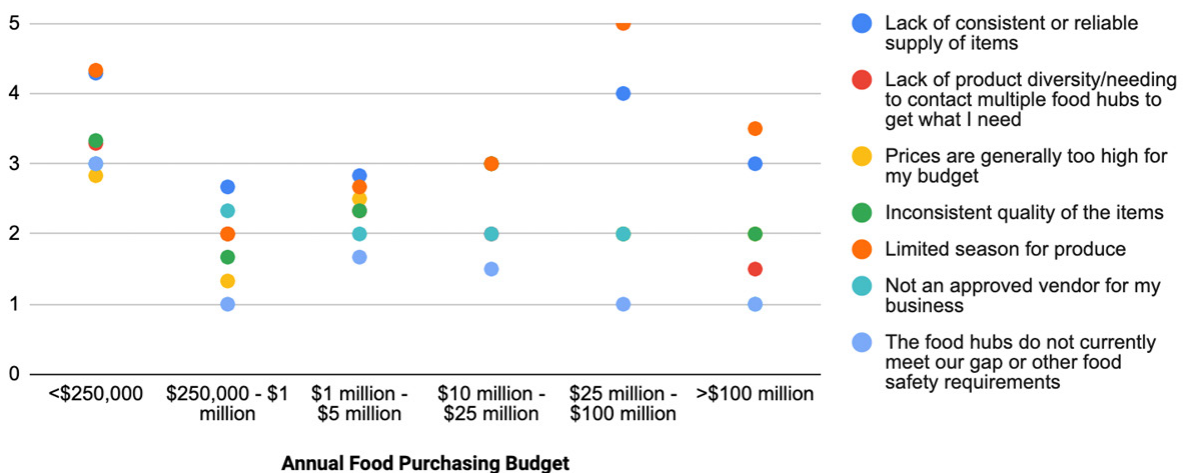
Rating of challenges Q18 (see graph below)

Similar to direct from farmers the main challenges are due to limited season, which results in lack of consistent supply.

- Top challenges across buyer size are limited season, lack of consistent supply, and some cited prices too high
- Gap does not appear to be much of an issue, nor does quality
- Not being an approved vendor is an issue for some

Challenges Businesses Face When Sourcing From Regional Food Hubs

Ranked from 1 (not a challenge) to 5 (considerable challenge)



Level of purchasing from Local Food manufacturers Q19 (%) and Q20 (\$)

Similarly, 38% say 10% or less while 44% say 11-30% purchased from local food manufactures. A few respondents at higher levels.

- Similar to those buying from food hubs. So those buying local are also buying processed/manufactured/ value added products.
- 40% under \$1,000 a week and 70% under \$5,000. Smaller percentage \$5-10k and more than \$10k

Challenges with local manufacturing Q21

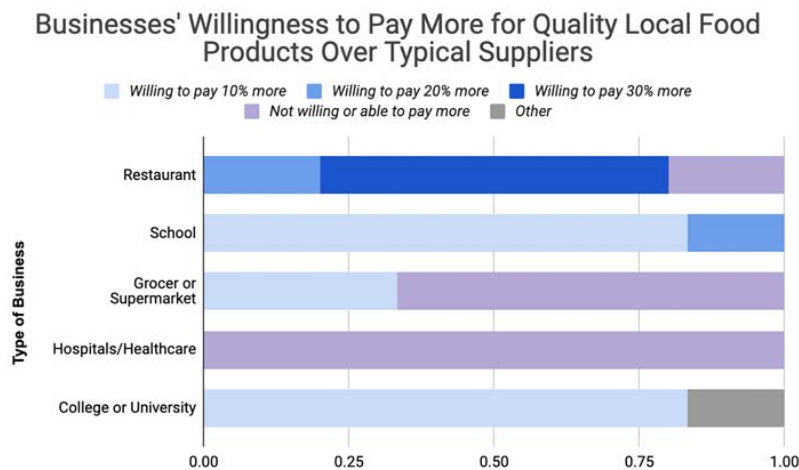
Top challenges include need to contact multiple manufactures to get what need, pack sizes not convenient, and for some not being an approved vendor.

- Ratings for challenges are lower overall for manufacturers
- Some indicated they buy local from their distributors or food hubs so not direct
- One indicated distribution is an issue

Local food pricing Q22

45% willing to pay a little more (about 10%) with few others willing to pay 20%, 30%. 9% and some other responses not willing to pay more at all. Others suggest 3-5%.

- Many recognize the value of local to their customers and willing to pay a modest premium with a smaller number willing to pay a higher premium.
- Restaurants were the most flexible with some willing to pay 30% more. Most schools that took the survey were also willing to pay more but to a lesser extent, up to 10%.
- Not surprising that there are strong feelings about prices. Some willing to pay more for local while others not willing, are unable due to budget constraints or as one said, "A small price premium is acceptable, but I do not want to be subject to commodity pricing changes while using a local market". Others look at the value proposition: "it depends on what the benefits are - delivery, what our market area can hold price wise" and "will determine by the volume".



Importance of product qualities and certifications Q23

Certifications and product qualities that were most valued (essential or very important) included:

- Humanely raised or grass finished certification for meat eggs and dairy
- Environmentally sustainable practices, but without certifications
- New York State Grown & Certified
- Certified fair and safe labor practices by vendors and suppliers
- Purchasing whole rather than processed ingredients

Others considered "important" (3 out of 5):

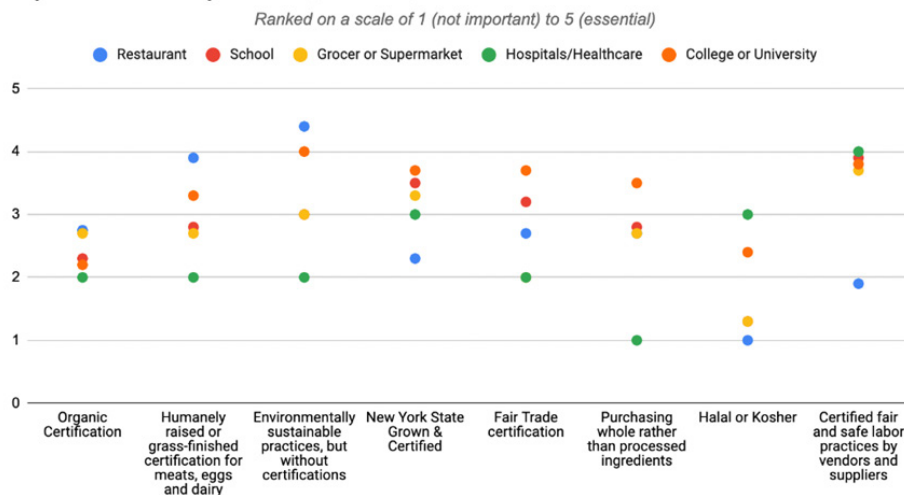
- Fair trade (65% included this as "important")
- Organic (about half included this as "important" or "very important")

Additionally:

- Halal or Kosher was "not important" or "only somewhat important" to 85%, with hospitals and universities having more appreciation for it than other buyers
- Restaurants ranked humanely raised/grass finished and environmental sustainable (without certs) highest with some appreciation for NYS grown and fair trade.
- Schools expressed value for NYS grown and Fair trade and certified fair and safe labor practices by vendors and suppliers
- Grocery/supermarkets value NYS grown highest followed by organic, humanely raised, environmental sustainability and purchasing whole ingredients.

- Universities rated most options on the higher level indicating that their market (students) demands attention to values based procurement. Environment, NYS grown, fair trade and humanly raised were rated high as was purchasing whole rather than processed ingredients.
- Certified fair and safe labor practices by vendors and suppliers received the most support by buyers. Most suppliers follow regulations, either state or other, so we mostly take this result to mean that buyers are aware of labor laws and want their suppliers to comply with them. HCWH has some good info here <https://practicegreenhealth.org/tools-and-resources/questions-suppliers-about-fair-and-safe-labor-practices>)

Importance of Specific Qualities/Certifications for Different Businesses



Additional qualities and certifications listed as important Q24

SQF (food safety) for valued added, Delivery options and cold storage for local items, Minority/Women-owned Business Enterprises (WMBE) Certified, supporting local business, GAP or AIB (food safety).

Require GAP Q25

25% yes, 20% likely in future, 55% do not require

- GAP or other food safety certification is often an issue for food service and for grocery but less so. The industry has been saying “we will require it soon” for many years now and it does not seem to happen. So, these numbers are not surprising.

Who prefer to buy from Q26

Only 10% prefer to buy direct from farm, while 62% from distributor or FH, 29% said either is fine

- Response is pretty clear that the preference of most is to buy from FH or distributor.
- But for some either is fine and a few prefer to buy from farm, so direct from farm is still desired by some buyers.

Reasons for their preference in Q26

- Depends on the item. Sweet corn for example direct but other not as concerned. Freshness and/or perception.
- The food tends to be fresher, and last longer. Local providers are easier to have contact with when an order needs to be updated or changed for any reason.
- Cut out the middleman. It feels better – we like to know our farmers.
- Food hub provides built in checks for safety and provides easy access to many items/farms with easy ordering and delivery.
- Easier to purchase and obtain. Wider range of products. Delivery. One delivery and invoice rather than many. Payment, invoices, process and delivery

- Time saving. Headwater takes care of all of the insurance and logistics for all of their suppliers and all I have to do is order. I would not have the time to follow up with dozens of farmers individually.
- They help navigate and set the crop or product needs with the farmers.
- Support our community partners, overall convenience for our distribution needs, we rely on our vendors and farmers for donations and relationship building for our nutritional standards.
- Our system is predicated on buying as much as possible from a single distribution source (so either lot from one local source or lot from their current nonlocal distributor)

Items most interested in purchasing locally (Select top three choices) Q28

Vegetables selected most often (in top 3 – 76% of time) followed by Dairy, Fruit and Eggs (top 3 – about 53% of time). Followed by meat, fish and poultry (in top 3 – 32% of time). Maple syrup, grains, value added, and wine/beer/spirits not in top 3 much at all.

- Locally produced vegetables followed by dairy, fruits, and eggs are what buyers want most.

What condition do buyers want their produce Q29

59% of buyers prefer some level of light processing for specific items, such as salad ingredients or certain fruits (to be chopped, sliced and/or bagged). 32% prefer mostly whole, fresh and unprocessed. No one selected majority frozen.

- Many buyers want local produce to be fresh but often like to save labor costs or don't have equipment to chop and cut etc. As a result, light processing is often desired for some products. However, there are significant buyers (32% in this case) who want all items whole and fresh.
- Despite no one selecting “the majority as frozen items” we know from other data that IQF local is a desirable product which helps extend the season and meet local procurement criteria (for example the School Food 30% program).

Likely level of future purchasing of local produce in season Q30

62% of respondents said between \$100-1,000 per week, 14% said \$1-5k, 10% said \$5-10k, and 14% more than 10k.

- This is similar to what they told us in Q12-13 and Q16-17 (already buying). However, in conversation and in roundtables there is a desire by those buying local to buy more if it fits their procurement systems and contracts and price point. For example, one college said they want to buy basic ingredients like onions, potato, peppers etc. that get used in food prep.

Likely proteins to be purchased from local sources Q31

Beef (selected 73% of time), Chicken (82% of time) and Eggs (73% of time) were checked most often. Followed by pork (59% of time). Low vote for lamb and lower for bison.

Purchase of local meat in future Q32

42% said \$1,000-5,000 per week. 9% said \$5k-10k. 23% said \$501 - \$1k and 18% said \$100-500. One said “a lot.”

- There is a market for meat with a range in volume of purchasing from small to quite large.

What opportunities do you see to expand the local and regional food system in WNY? Q33

Opportunities most often selected include: Better local food distribution (80%), Expanding greenhouse facilities and other methods to expand production season (76%), Stronger regional branding of WNY products (57%) and Investing in the capacity of local farms (57%). Assisting people of color to start or expand food and farm businesses was selected 29% of the time.

Beyond purchasing, what else does your business do to expand the supply of local food Q34

Note: could only choose one due to survey issue: 30% do nothing beyond purchasing. 60% intentionally build strong working relationships with farms/local suppliers.

Would your business consider (further) partnering or investing in efforts to build out the capacity of the local and regional food supply chain? Q35

63% said they would consider further partnering or investing in effort to build out capacity for the local and regional food supply while 37% said they would not.

If yes to Q35, Would you consider investment into farms, food hubs, local food manufacturing and other local food businesses by doing any of the following? Please check all that apply. Q36

A small portion of respondents said they would consider providing loan capital 15%, equity investment 8%, grants 8%, and technical support to build capacity 15%. A larger portion said they would consider contracting in advance for products 85%.

- Summary of questions 33-36: It seems that buyers would be willing to help build out the local food system beyond building working relationships with farms/suppliers (which is excellent). Things like better distribution, season extension, regional branding and working with BIPOC residents to start or expand businesses could be attractive activities. Contracting for product in advance was overwhelmingly selected as an investment activity and is probably familiar to most if not all the buyers already. Other suggested investment activities were less attractive and are probably more suited to a fund or lender of some type but with some reassurance that there is a market or contract for product.

Institutions: Describe commitment to purchasing locally produced food, if have one. (may also include sustainable, fair, or other criteria) Q38

Open ended responses:

1. We have a commitment to purchase most \$ through small business. I would like to expand to more local farmers.
2. 80% local – meaning local distributors of global products as well as local farmers. There is no firm number as to how much goes to local producers, but we exceed their expectations.
3. During rolling 5-year periods our goal is to purchase 20% of our total spend on goods and services that meet this criteria.
4. Our contract requires 80% spend with local companies. That includes a local distributor of national products.
5. 20%
6. \$6,500,000
 - Responding institutions have local supplier of goods and services commitments or local food commitments indicating a commitment to support the regional economy.

If commitment to buy from businesses owned by people of color, describe it. Q41

1. 61%
2. 10% during a rolling 5-year period
3. Growth of 2-3% per year
 - Several institutions have a commitment and goals to purchase from BIPOC suppliers, some are quite significant.

Do you participate in the GFPP? And if not do you want to learn more? Qs 42 and 43

- No one is participating in the GFPP. But 85% said they want to learn more about it.
- We know from other conversations that only BPS is looking at GFPP and has completed the assessment phase of that process as of spring of 2022.

Would you be interested in participating in a working group to create success with local and regional food at institutions such as universities, colleges, hospitals, schools etc. Q44

- 10 respondents said they would be interested in participating and they provided names and contact information. Those names and contact information have been provided to NYSAWG

Farmers and Producers Survey Summary

The full findings from this survey can be found here: https://www.surveymonkey.com/results/SM-HdrD4RBFyfZJZ2lS8q_2B3Kw_3D_3D/

Demography of respondents

- Age of respondents: slightly more than half were 30-49 years old;
- 30% were 50-64; only 3% <29
- 55% men, 43% women
- 85% white, 3% (2) African American, 0 Latina, 12% no response

Type of Farm

- Urban - 16%
- Organic farm - 13%
- Regen/sust/org (self described) - 63%; 20% moving in that direction

Years in Operation

- More than 25 years (38%);
- 3-10 years (32%); <3 years (8%)

Profitability

- Profitability: 52% profitable most years
- 32% profitability is highly variable from year to year
- 12% are not profitable

Challenges to Profitability

1. Rising input costs/stagnant prices (49%)
2. High labor costs/labor availability (48%)
3. Low and variable prices for products (41%)
4. Markets too small or unreliable (23%)

Land Ownership

- Rural Farms: 45% own & lease; 38% own all land
- Urban Farms: > All own some or all of the land they currently use; 2 also lease land

Mix of products they produce

- Mix of 2 or more categories - 36% (included primarily meat and produce farmers)
- Dairy - 18%
- Milk - 15%
- Fruit/berries - 11%
- Beef, meat cuts - 8%

Access to additional farmland

- 47 of 60 have access to more land than is currently in production
- 38% have access to 1-10 acres
- 32% have access to 100 or more acres
- 28% have access to 11 - 50 acres

Scale of operations

- 49% in process of expanding vs 10% scaling back
- 38% at level they want to be

Sales (annual average, last 4-5 years)

- Larger farms (>\$1 million) - 30% (18)
- Smallest (<\$20k) - 26% (16)
- Between \$20-\$100 - 18% (11)
- Between \$100-\$500 - 16% (10)

Markets Sales Composition (majority of sales)

- DTC (Direct to Consumer) - 38%
- Dairy co-ops - 18%
- Relatively equal mix of wholesale and retail - 13%

Sales Trend (past ~4 years)

- Increasing: 62% (20% substantially, 42% somewhat)
- Decreasing: 5%
- Steady: 33%

Covid Impacts:

- Increased sales - 43% (30%, between 10-30% increase)
- Stayed the same - 46%
- Decreased: 11%
- Did Covid impact type or choice of market outlets used?
- No - 66%

For DTC farmers, biggest outlets:

1. Own farmstand - 41%
2. Farmers' Markets - 34%
3. CSA - 23%
4. E-commerce - 21%

Excess Produce in most years?

- No - 50%
- Small amount, which they are able to utilize - 23%
- Consistently (8%) or occasionally (18%) have excess, for which they need markets
- Ability to donate excess produce
- 55% can't
- 44% could either donate or sell at decreased price

Satisfaction with current markets

- Very satisfied - 15%
- Not satisfied, looking for new/better markets - 25%
- Generally satisfied, but interested in expanding or improving markets - 59%

Institutional Markets - Considering?

- Yes - 22%
- No 62%
- Maybe 15%

Sales experience with institutional markets (among those who sell or have sold to such markets):

- Good to very good - 20%
- Okay, with some problems - 47%
- Very challenging/none - 33%

Biggest Problems with Institutional Markets

- Prices too low - 43%
- Volume too low (22%) or too high (17%)
- Package/label/delivery requirements - 22%
- Require GAP certification (Good Agricultural Practices, a food safety protocol) - 17%

Sales to Lower-income Households or Markets Catering to lower income HH

- 56% have not tried
- 35% currently sell some of product to lower-income HH, directly or through intermediaries

Is Farm Waste Disposal a Problem for you?

- No, already utilize all waste/byproduct - 71%
- Yes, seeking ways to utilize or partners to accept waste- 29%

Overall Biggest Challenges:

1. Prices for product are too low - 57%
2. Labor challenges (cost, availability, skill) - 57%
3. Markets not consistent/reliable - 33%
4. Land access (including to quality land) - 26%
5. Insufficient capital/investment - 23%

What are top needs to become more successful/profitable?

1. Better prices - 54%
2. Better on-farm infrastructure - 37%
3. More reliable labor/workforce - 36%
4. Access to better markets - 31%
5. Access to grants, affordable loans - 30%

Questions for Specific Farm Types

Meat Producers (17 responses)

- >Half raise >2 kinds of animals (primarily beef and hogs)
- 18% - mostly beef; 12% mostly poultry
- 50/50 split between those selling halves and quarters vs custom cuts (ie, ready for retail)

Scale of operation (number of animals processed per year)

- Beef, pork
 - 11-50 animals per year processed - nearly 60%;
 - <10 animals per year - 18%;
 - >100 animals/yr- 1/7%
- Poultry
 - <500 per year - 63%
 - 500-1k - 11%;
 - 1k-5k - 6%
- 82% currently working to finish and sell their beef/pork/lamb locally or interested in transitioning to local markets
- Access to Processing for Meats
 - 56% - major problem/limiting factor for their operation
 - 11% - adequate processing for their needs
 - 11% - A problem at times, but not a major problem

Produce Farms

Size of Farms

- <2 acres - 29%
- 2-10 acres - 21%
- 11-20 acres - 8%
- >50 acres - 29%

Orchards

- <10 acres - 62%
- 100-500 acres - 38%
- Nothing in between

Market strategy for DTC (Direct to Consumer) Farms

- Looking to expand DTC sales - 29%
- Looking to increase sales by selling to food hubs, co-op, etc. - 25%
- Satisfied with current size and quality of markets - 25%
- Looking to sell to institutions, schools, retail - 13%

GAP Status, Plans

- Currently GAP certified - 38%
- Not willing to be GAP certified - 25%
- Would consider GAP certification, but need help - 21%
- Willing to get GAP certified if markets require - 17%

Do you have difficulty Selling your Seconds?

- Yes, willing to sell at decreased price - 25%
- Yes, and willing to donate - 12%
- No (42%), use seconds in value-added products (25%) or use ourselves (17%)
- No, already have markets for seconds - 21%

Dairy/Hay/Grain farmers

Satisfied with sales, markets, profitability?

- Somewhat satisfied, but varies year to year - 50%
- Satisfied most years - 42%
- Not satisfied, looking for alternatives - 8% (1)

Tried selling locally?

- No - 58%
- Yes and would like to expand this - 33%

What products would you be interested in selling locally?

- Non-food products, e.g. hemp, fibers - 33%
- Custom - 17%
- Value-added products (not dairy) - 17%
- Solar, wind - 25%

Urban Farms (5 responses) (to this section)

Land access, including quality land that is not contaminated

- Major problem due to cost - 60%
- Major problem due to local regulations, restrictions - 60%
- A challenge but not a major one - 20%

Market Mix

- 100% - "A good mix of two more more segments"
- People in neighborhood of farm; middle/upper class; schools, clinics, mobile markets

Relationship to Town

- Mixed, could be improved to address my challenges - 60%
- Not good - 20%
- No relationship - 20%
- Solid relationship; town officials helpful and responsive - 0%

Dairy (11 responses)

Size of Operation

- >1000 cows - 37%
- 500-1000 cows - 27%
- 100-499 cows - 18%
- <100 - 18%

Number Selling to Upstate Niagara and DFA equal split (45% each)

- Remaining 10% do not sell to major co-ops

Satisfaction with Co-ops

- Somewhat, but would like better prices - 45%
- Very satisfied - 27%
- Unsatisfied - 18%

Considered or attempted micro-dairy or value added dairy product?

- No, not tried or considered - 64%
- Not tried, but interested in learning more - 27%
- Tried, worked well, looking to expand - 9% (1)

Type of Operation

- Year round, conventional dairy - 90%
- Grass-based or organic - 0%

Interest in diversifying beyond milk/dairy?

- No - 55%
- Yes, considering - 27%
- Yes, diversifying - 18%

Farmers Market Survey Summary

The full findings from this survey can be found here: https://www.surveymonkey.com/results/SM-tYdlItuyDlnEF9T-p3KdlwpQ_3D_3D/

A map of the farmers markets who responded to the survey can be found here: <https://www.google.com/maps/d/u/0/edit?hl=en&hl=en&mid=lyvmkXNmEx4rpFbl06i57yfyvIB9E7iM&ll=42.68999583619218%2C-78.91015937842954&z=8>

Twenty seven people responded to this Spring, 2022 survey, out of 54 managers of farmers markets in the WNY region

General Market Characteristics

- Mix of “new” (<5 years) and “established” (>5 years)
- ~2/3 located in town center, balance in town near but not in the center of town
- 88% are open-air, only 2 have cover - indoor/pavilion
- 58% utilize donated or very low cost space, 15% own the property
- Most markets (54%) are “mid-size,” i.e. can hold 20-50 vendors; can hold <20; 10% (3) between 50 and 100
- 2/3 are seasonal (<6 months); 20% for 6-9 months; only 11% (3) are year round
- 1/3 are managed by a non-profit, 20% by town/county, 15% by vendors; most others are a combination of vendors and NP/CBO

Decision Making

- Decisions in 38% of markets made by vendors or board they elected, 23% by NP parent
- Majority are not affiliated with any market association or network
- 30% part of state market association
- Market manager is volunteer - almost half
- Paid part-time: 27%
- Paid full-time: 19%
- Market fees: 92% charge vendor fee (set)
- No fees: 4% (1)
- One third of markets are Producer-only (vendor must grow, raise, make product themselves); 2/3 allow buying and re-selling, most of these with specified limits

Budget/Revenue

- Operations costs covered by vendor fees - half (50%)
- Vendor fees + grants and donations - (33%)
- Covered by local government - 8%

Surplus or Deficit

- Only 10% operate with deficit
- 15% have surplus; 35% cover costs
- Almost 40% cover costs but need more funds to grow or expand

Customer Surveys*

- 27% survey customers every year or two (in person or online)
- 23% have done surveys but it's been more than 3 years
- 33% have not done a survey for more than 5 years

Vendor Surveys*

- 38% survey vendors every year or two
 - 27% have done a vendor survey but not for more than 3 years
 - 35% have not done a survey
- *Almost 80% state that results of vendor and customer surveys have not significantly altered the market

SNAP, WIC, SFMNP

- Half accept all 3 benefit programs; another 19% accept SNAP and SFMNP
- 8% accept SNAP only; 15% (4 markets) accept none
- 85% accept SNAP
- Use of SNAP and other programs has increased over the past 2-3 years in 46% of markets; stayed level in 19%; decreased in 4% (1)
- Double Bucks
 - Fewer than half (46%) offer a “double bucks” program
 - SNAP sales have increased substantially faster for markets that offer double bucks than for those that do not

Government

- $\frac{3}{4}$ have a good relationship with local government
- Of remainder, half say they have no relationship; only 12% say it “could be better”

Size and Sales of Markets

- 50% do not track sales; of those that do, most (85%) estimate <\$100k in annual sales (very small)
- 1 market at \$100-250k; 1 market of \$250-500k
- Sales have increased modestly (10-20%) over past 3 years for 46%, substantially (>20%) for 8%, stayed the same for 8%, 23% don't know

Outreach and Community

- Nearly all do activities at the market, with live music and kids' activities the most common, followed by health education
- 96% do either a small amount (58%) or significant amount (38%) of outreach and promotion

Covid Impacts

- 1/3 - no significant impact
- 2/3 - significant impact; vast majority report an increase in customers, and/or sales, and/or SNAP sales

Customer Base - Characteristics

- Incomes
 - 37% report primarily working class and lower income customer base
 - 37% report fairly equal mix across incomes lines
 - 26% believe they are relatively representative of their local community
- Age
 - 70% describe fairly equal mix across age
- Race
 - 56% - a broad mix of people, fairly representative of community
 - 41% - primarily white
 - None reported either “strong or increasing population of immigrants” or “predominantly POC and/or immigrants”

Outreach to Low-income People

- 37% have seen an increase in customers using SNAP, etc.
- 37% do “little to no” outreach; balance do outreach primarily through community based organizations (44%) or agencies (30%)

Customer Purchases – Average customers spend per market day (estimates)

- 60% don't know; of those that do, most (26%) say \$10-19; another 11% \$20-29
- Only 1 market (4%) reported \$30-39
- Over past 3 years, average customer spending has increased by 10-20% for 42% of markets; stayed about the same for 35%

Market Growth (Customers, Sales)

- Growing slowly and will continue to do so - 48%
- Growing significantly and will continue to do so - 32%
- Plateaued, not likely to grow without lots of effort to bring in more people - 20%
- Declining - 0%

What will it take to enable the market to grow significantly more?

- 59% - need to grow the customer base
- 48% - need to get the current customers to purchase more of their groceries at the FM
- 41% - have plenty of customers, need more vendors and more diverse products

Biggest challenges market faces:

- Almost 40% cited not enough vendors at market to attract strong customer base
- 26% said there are too many nearby farmers markets competing
- 25% cited need for expanded customer base

Vendors

- 60% - “primarily white”; 24% - relatively equal mix of white and POC
- Half of markets have 11-20 vendors on market days; 20% have <10,
- 20% of markets have 20-30 vendors
- only 8% (2) have >30; no one above 50 vendors
 - Over past 3-5 years, 35% of vendor numbers increased somewhat; 20% increased substantially; 16% saw a decline
 - >half of markets have actively recruited more vendors, though word of mouth from current vendors has been equal in impact
 - For those with decreasing vendor numbers, main reason is insufficient sales

Other Sales Outlets (for their vendors)

- ¾ of markets believe that a substantial portion of vendors sell to other FMs and at their own farm/farmstead
- Almost half sell to other retail, and/or wholesale
- 40% have or sell to a CSA
- Of vendors who identify as “organic, grassfed,” other such:
 - Relatively few
 - 50% of markets report 10% or fewer of vendors
 - 75% say 20% or less

Vendor Recruitment

- 48% do it and have been successful with it
- 36% have tried, but with little to no success

Aspiring Farmers and Food Entrepreneurs

The full results from this survey can be found here: https://www.surveymonkey.com/results/SM-OL6XChx4m6tx-mcSILdIfRw_3D_3D/

Demographics of respondents

- More than half between 30 and 49, another 25% between 50 and 64;
- 60:40 women to men
- Over 80% White, 8% Black or Latina

Business characteristics:

- 80% farm, organic farm or market garden
- 35 % home-based and/or value added food business (some are both)
- Over half motivated to start biz to help community with healthy foods; one third motivated to feed selves and family better; 25% hoping to achieve FT income
- Business structure: 80% as private, for-profit; 12% as N-P social enterprise; only 1 community owned business
- Size/scale of business: one third very small, with annual sales <\$10,000; 22% had sales between \$10K and \$50K; 30% with sales >\$100,000

Financial and technical assistance:

- Great majority sought advice or technical assistance of some kind. The primary sources of TA they sought were:
 - Govt agencies - 83%
 - Family and friends - 79%
 - Independent consultants - 41%
 - Non profits and CBOs - 33%
- For those who experienced difficulties securing TA, the biggest problems identified were too much paperwork/hoops/bureaucracy (53%) and a lack of understanding of the business (47%)
- Most who started businesses have sought financial assistance of some kind, with by far the most common being government grants.
 - Of those unsuccessful in receiving grants or loans - from all sources - the most common reason given was that the process was too difficult or complicated
 - No respondent cited race, gender or age bias as a reason for not receiving funds, though 20% did say that they thought funders rarely supported 'businesses like this in my neighborhood/community'
- For aspiring entrepreneurs who were unable to launch their business, 75% stated that they had not sought financial assistance, with nearly 70% of them citing the difficulty and complexity of applications for grants and loans
- Most of the businesses required land (nearly 70%) and a building (over 80%). About three fourths were able to secure the land and/or the building they needed for their business
 - However, for those respondents who had tried but failed to launch a business, securing land and facilities was much more problematic, with 88% stating that they had not been able to secure the necessary land, and over 70% unable to secure the necessary building or facilities

APPENDIX K: Alternative Retail Models and their Applicability for Access, Equity and Sovereignty

Models	Essence of Model	Strengths	Weaknesses	Application for AES	Regional Examples	Outside region Examples
	Brief statement of what it is	List the key ones	List the key ones	Does it work for food access and if so how, why?	Name and link	Name and link
On-line Markets	On-line ordering by individuals from a group of farmers where product is pooled	<ul style="list-style-type: none"> ❖ Easy access by consumers ❖ Low-cost structure ❖ Farmers set price ❖ Easy access by farmers 	<ul style="list-style-type: none"> ❖ Low participation in our region ❖ There are many small farmers, so if too many sell on one platform it will drive the price down. ❖ May reduce number of farmers who can benefit ❖ Often targeted at higher income consumers 	<p>Accept SNAP and similar programs.</p> <p>Provide an alternative option for those who do not feel safe in grocery stores due to Covid</p> <p>Opportunity to place pick-up destinations in underserved areas, and areas with low vehicle ownership</p>	<p>Farm Drop</p> <p>Freshfix Buffalo</p>	<p>Sourcewhatsgood.com</p> <p>Grownby.app</p> <p>Open Food Network</p> <p>4P Foods</p> <p>Kitsap Fresh</p>
Alternative Brick and Mortar	Community focused retail stores driven by selected values. Aims to be financially stable if not profitable to serve their community. Examples include cooperative markets, non-profit grocery stores, and Farm Stops	<ul style="list-style-type: none"> ❖ Opportunities for collaboration among coops (NCG) ❖ For coops, about 15-20% of food is local as opposed to only 4% at larger grocery stores ❖ Money stays in the community ❖ For farm stops, more money goes to producers compared to typical grocery stores 	<ul style="list-style-type: none"> ❖ Fixed costs are very high, difficult to be profitable ❖ Small scaled compared to large grocery stores ❖ Rely on community funding 	<p>Accept SNAP benefits</p> <p>Usually open year round and committed to local sourcing and local economy</p> <p>Many participate in double up food bucks. Large grocery stores are not listed on the DUFb website, it's mostly farmers/curbside markets</p> <p>Can offer culturally relevant foods</p> <p>Farm stands eliminate the middleman/distributors, making their prices lower</p> <p>Strengthen the local economy by being committed to local products and offering higher margin to producers</p>	<p>African Heritage Coop</p> <p>Bargain Grocery</p> <p>Abundance Food Coop</p> <p>East Aurora Coop</p> <p>Lexington Coop</p> <p>MAP</p>	<p>Good Food Markets</p> <p>Bargain Grocery</p> <p>Farm Stops:</p> <ul style="list-style-type: none"> ● Acorn Farmers Markets ● Random Harvest ● The Wild Ramp ● Boone Street Market ● Local Roots ● Argus Farm Stop <p>Farm stops combine the best qualities of farmers markets and grocery stores. Farmers receive most of the sale, and they offer fresh, healthy food. At the same time, they are convenient and year-round</p>
Mobile and Pop-up Markets	Markets that travel to scheduled locations, go to events, and farmers markets. Emphasis on going to neighborhoods	<ul style="list-style-type: none"> ❖ Can access many markets and go to events where there are a lot of people 	<ul style="list-style-type: none"> ❖ Limited time frames in each area ❖ They do not have one large, solid market. They have to research areas 	<p>These markets can travel to underserved communities and provide healthy food to these areas</p>	<p>The Veggie Van</p> <p>Urban Fruits and Veggies</p>	<p>Goodr</p> <p>Interfaith Food Shuttle</p>

	with higher food insecurity environment		before they go there and they do risk not having a large enough market in that area	Can serve communities with low-vehicle ownership. Accept SNAP and similar programs Can utilize excess product and seconds offering them at reduced prices and helping to reduce food waste	Massachusetts Avenue Project African Heritage Coop Foodlink Curbside Market	Arcadia's Mobile Market Arvada's Veggie Van
CSA	Consumers buy a share of a farm's harvest in advance providing capital and a predictable market for the farmer	<ul style="list-style-type: none"> Offers the freshest produce Upfront payments offer increased cash flow Multiple producers 	<ul style="list-style-type: none"> Shares can be expensive upfront, likely difficult for low-income families. They may offer payment plans but that is a financial obligation CSA packages can be limited to certain times of the year The grower has to have a lot of different products 	There are programs that will reduce the costs for lower-income customers Some are eligible for SNAP or DUFB Opportunity to place pickup locations in underserved areas and areas with low vehicle ownership	Sunscape Farms Wickham Farms Mud Creek Farm Common Roots Urban Farm 5 Loaves Farm	Local Foods Cafe - Farm Fresh RI Athenas Harvest
Farmers Markets	Farmers and producers sell their products directly to consumers at markets sites in both urban and rural communities	<ul style="list-style-type: none"> Offers the freshest produce Offers the highest profit margin to farmers/producers Provides a community/social event 	<ul style="list-style-type: none"> May not be accessible for those without vehicles Not all are year-round or have limited hours/days of the week Prices can be higher than conventional retail stores Can be hard to attract farmers to low volume markets 	Better if can extend the season or even year-round Can be established in underserved neighborhoods but can be challenging Accept SNAP and incentives Easy market access option for new food and farm businesses	Grant Street FM Brighton FM South Wedge FM Westside FM Elmwood Village FM North Buffalo FM Jamestown FM	Boulder County Farmers Markets Farm Fresh RI
Urban Farms with retail	Growing, producing, and selling food in urban and suburban settings	<ul style="list-style-type: none"> Creates community with a public growing space that people can visit and volunteer at Having control over growing and selling, they can set price 	<ul style="list-style-type: none"> Access to land Seasonality Have to pay both growers and retail workers 	With community kitchen Space for/incubation of food enterprise Education Would be beneficial to have urban growers/sellers in areas with low vehicle ownership	MAP Sunscape Farms Urban Fruits & Veggies	Black Urban Gardeners and Farmers of Pittsburgh Co-op The Farm at our House (online retail)

Other direct farm to consumer	Other models that do not fit into the others listed Often look more like a restaurant type businesses	❖ Create a space to meet with friends/family and provide an experience	❖ Prepared foods are more expensive	Eliminates the middleman/distributor, making prices lower Could offer a volunteer for your food or pay what you can option		
				Opportunities for education such as learning recipes and how to prepare and cook fresh produce Could offer a volunteer for your food or pay what you can option Business ownership opportunity	Salud	Snap Pea A Place at the Table Misfits Market

APPENDIX L: Access, Equity, and Sovereignty

The Access Equity and Sovereignty Appendix contains maps, images, notes, surveys, ephemera, and other reference materials that were processed, used, collected, and/or created during the time of study. These various materials were integral for the creation of the larger Access, Equity, and Sovereignty report, including the findings and the recommendations.

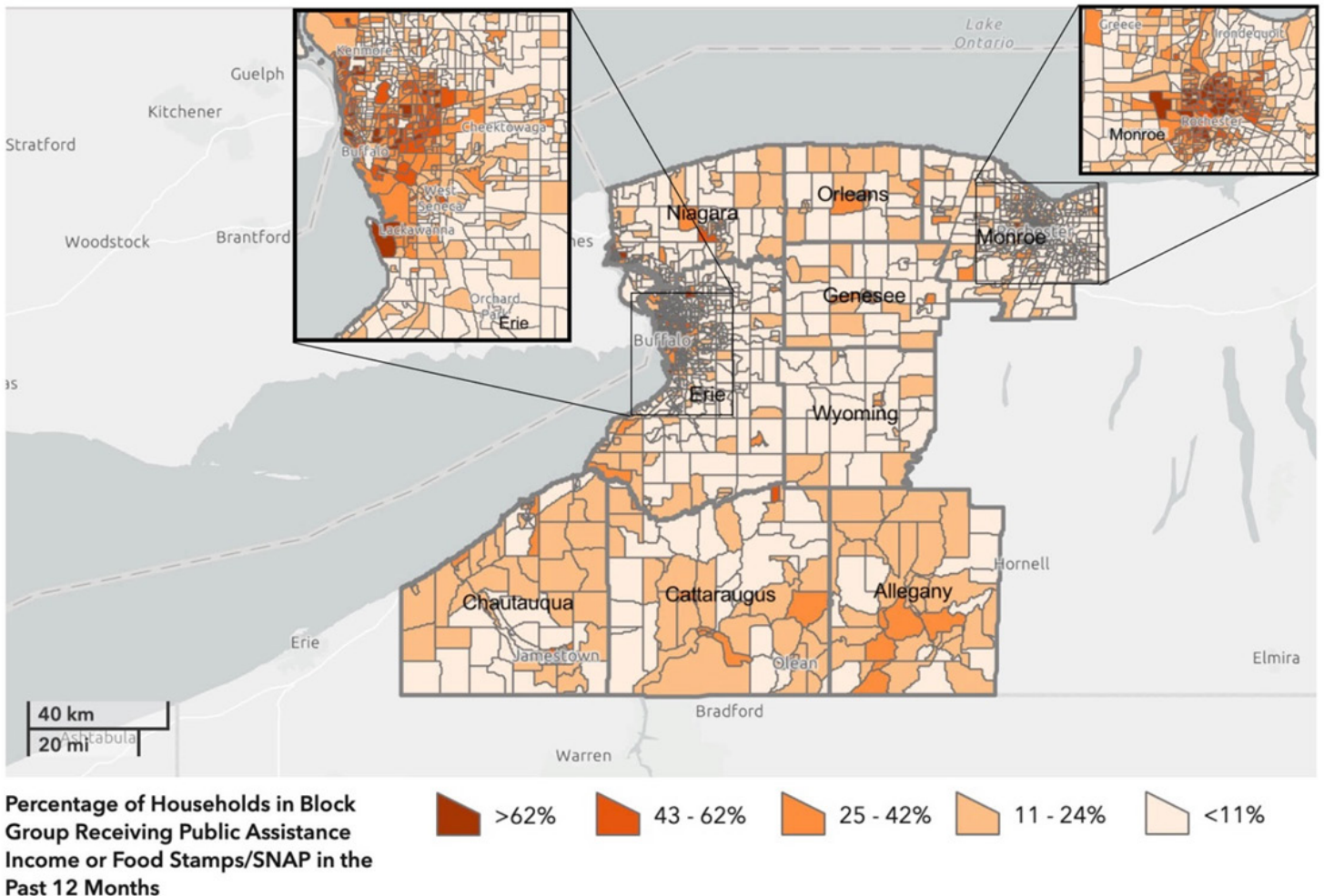
Table of Contents

1. Maps
2. SWOT Diagram and Tables
3. JEDI Questionnaire, Survey and Results
4. Photos
5. Progress Report Readings and Resources
6. Interviews
7. Site Visits
8. Work Group Meetings

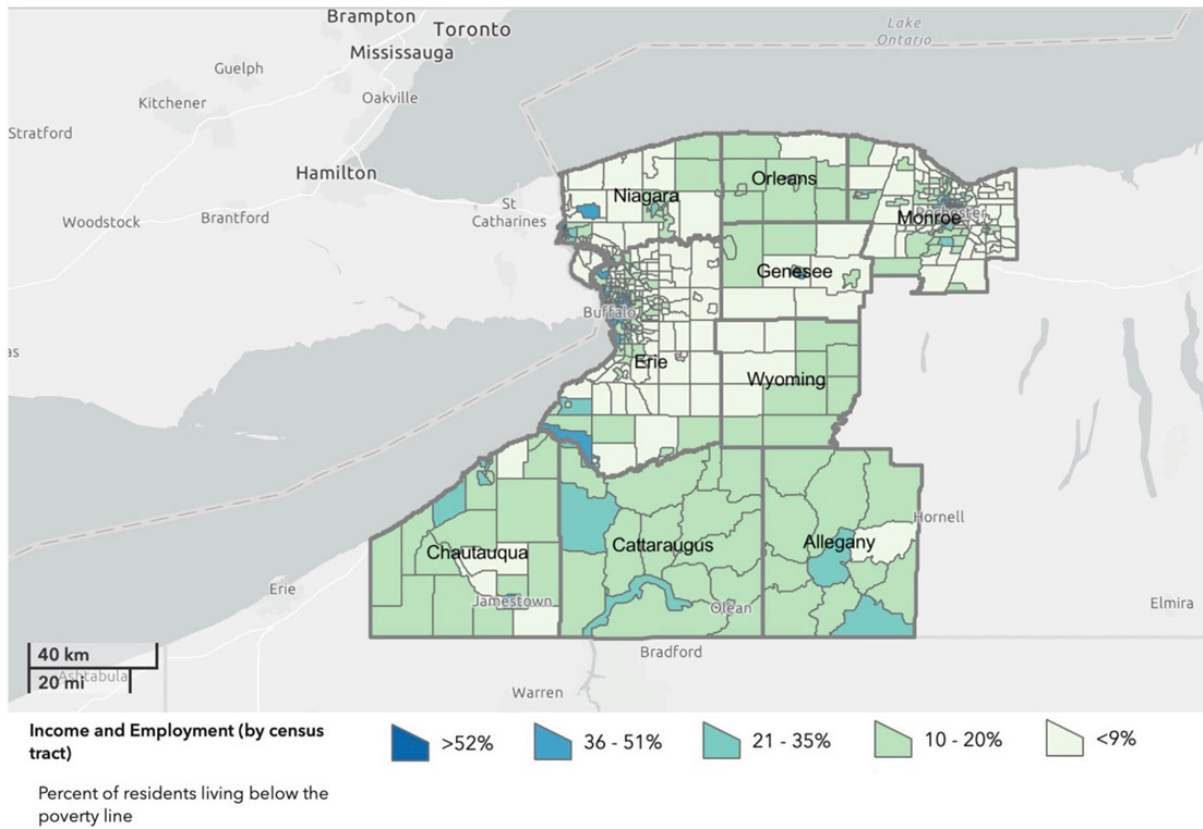
I. Maps

Making Access To Healthy Food A Public Policy Priority

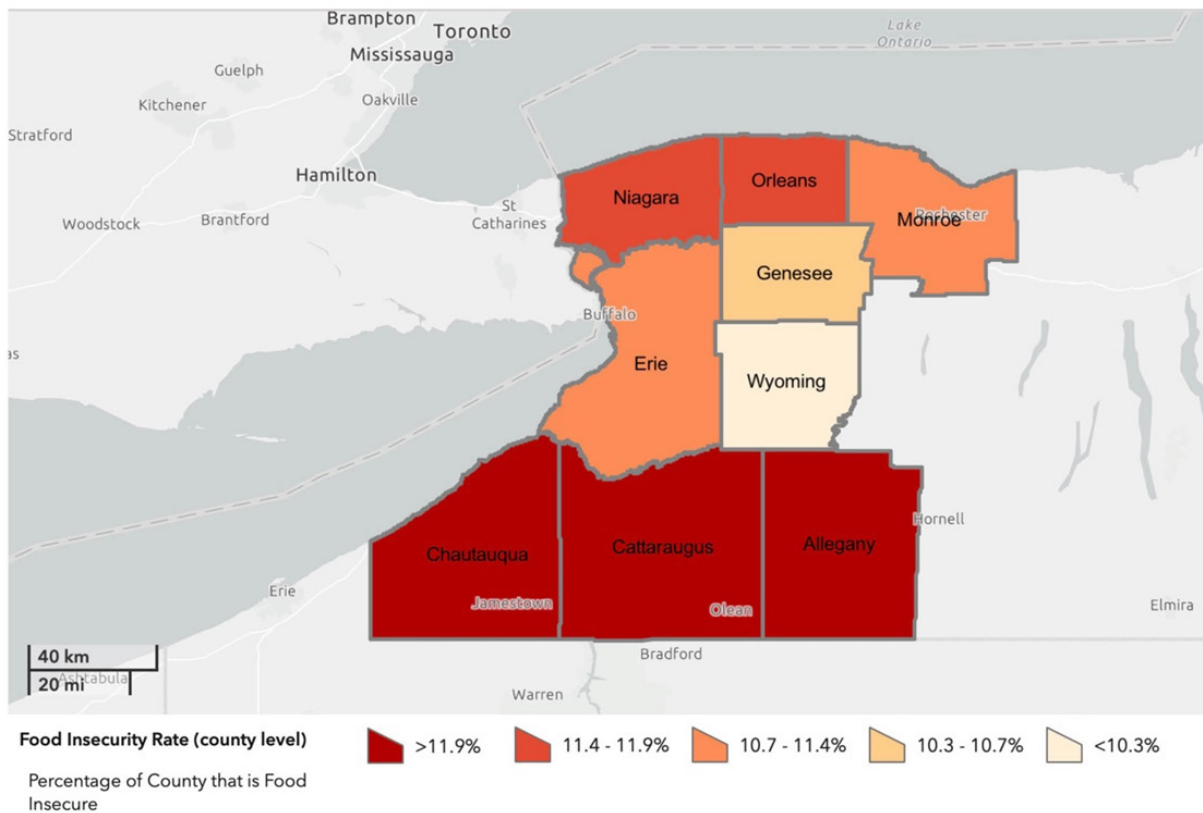
Findings Introduction: An identified Access, Equity, and Sovereignty working group priority to develop WNY Healthy Food Priority Areas (HFPAs), a regional mapping project to identify gaps and opportunities across the spectrum will be undertaken by the State University at Buffalo's Food Systems Planning and Healthy Communities Lab. Stakeholders in the region's food system will co-design the portals that map and monitor problems and/or opportunities. The mapping portal will aid multiple groups of 10 in making practical, strategic, and policy decisions within WNY. Access to timely and community-relevant information about food-related assets will play a key role in COVID-19 recovery. Collecting data and measuring results consistently across all the participants ensures shared measurement for alignment and accountability. Map 1- 10 courtesy of Information Drives WNY Region Food System Initiative.



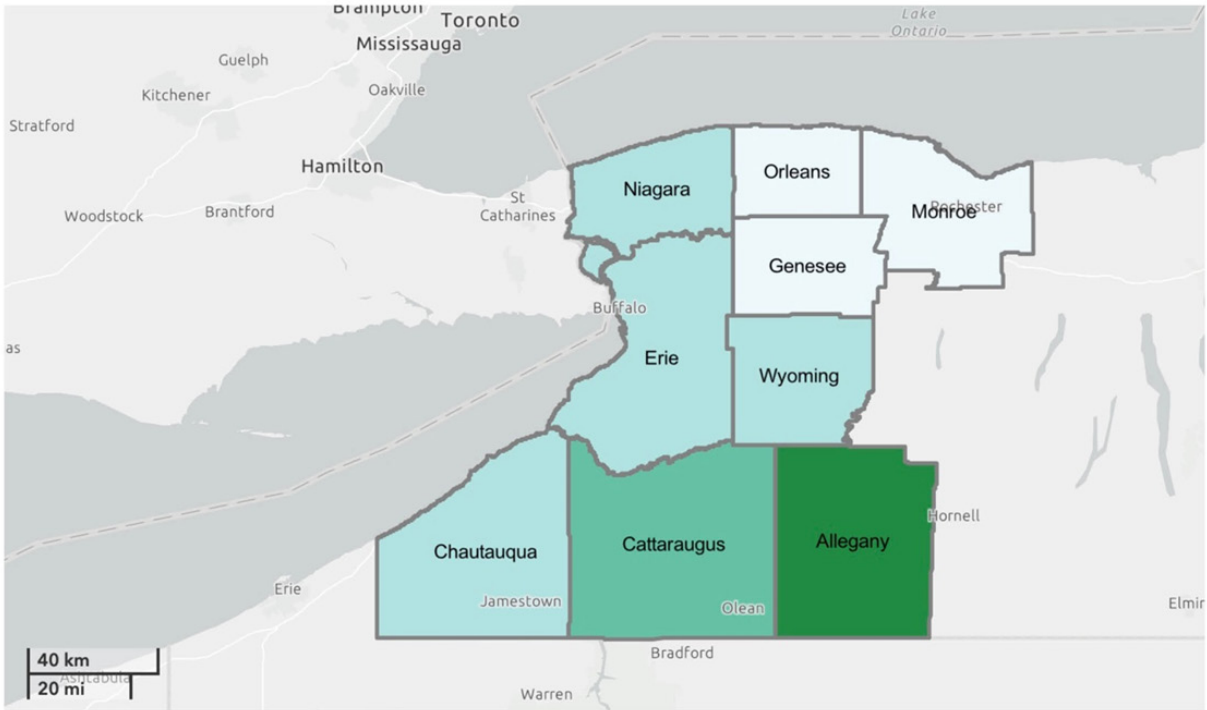
Map 1: 9-county region of Western New York showing the percentage of households receiving public assistance or food stamps/SNAP. Zoomed in areas showing Erie and Monroe counties.



Map 2: 9-county region of Western New York showing the percent of residents living below the poverty line

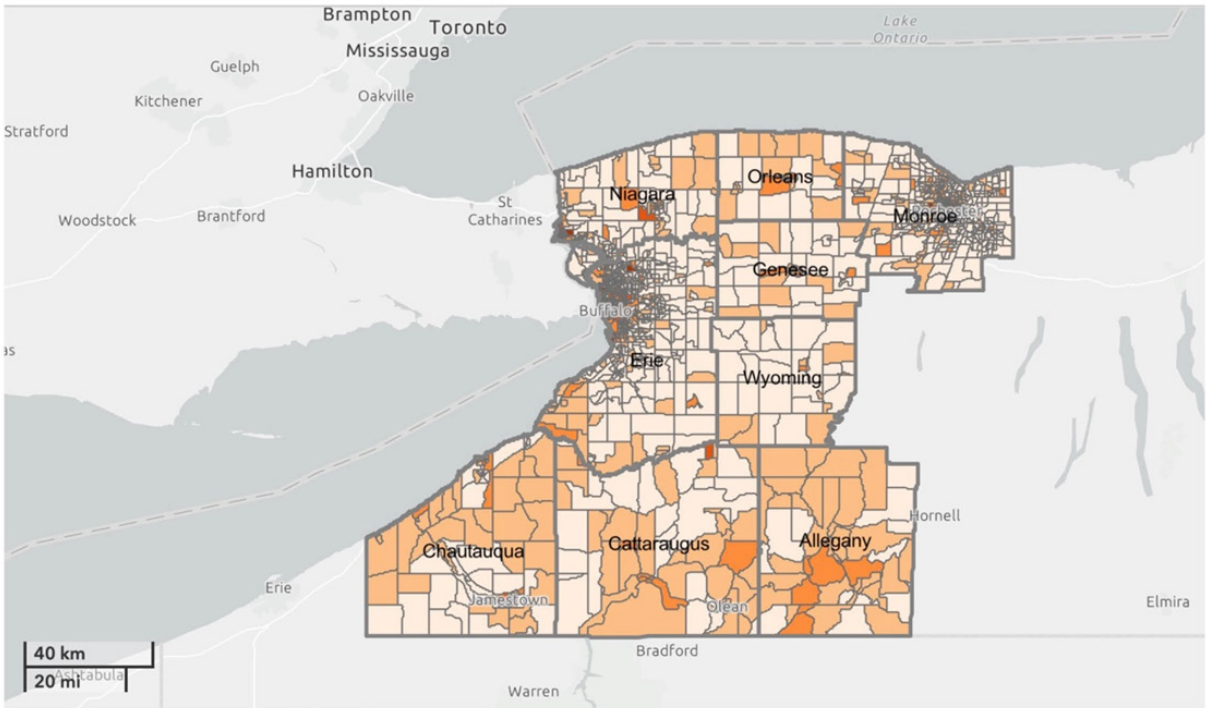


Map 3: 9-county region of Western New York showing the percentage of county that is food insecure.



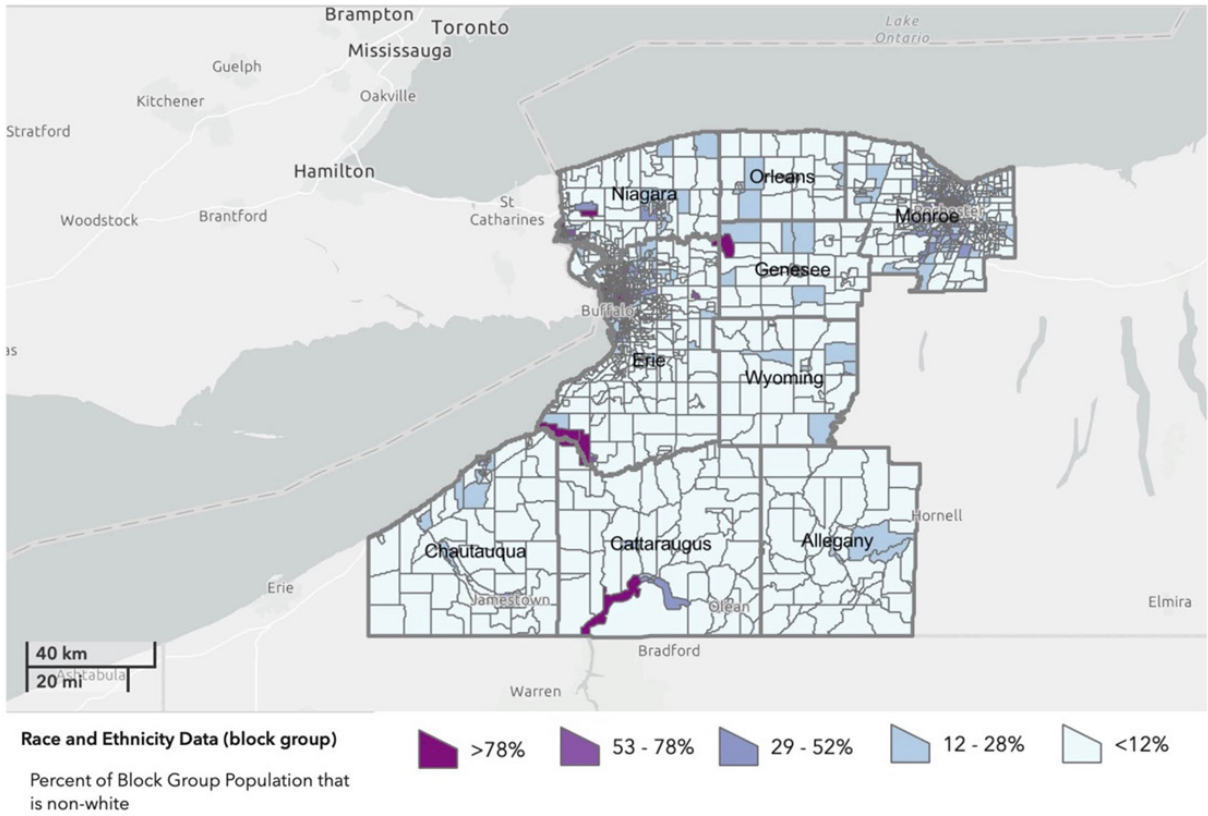
Health Indicators (county level)
 Age-adjusted percentage of adults who report consuming less than one fruit or vegetable daily (no fruits and vegetables), 2022

Map 4: 9-county region of Western New York showing the percentage of healthy adults consuming less than one fruit or vegetable daily

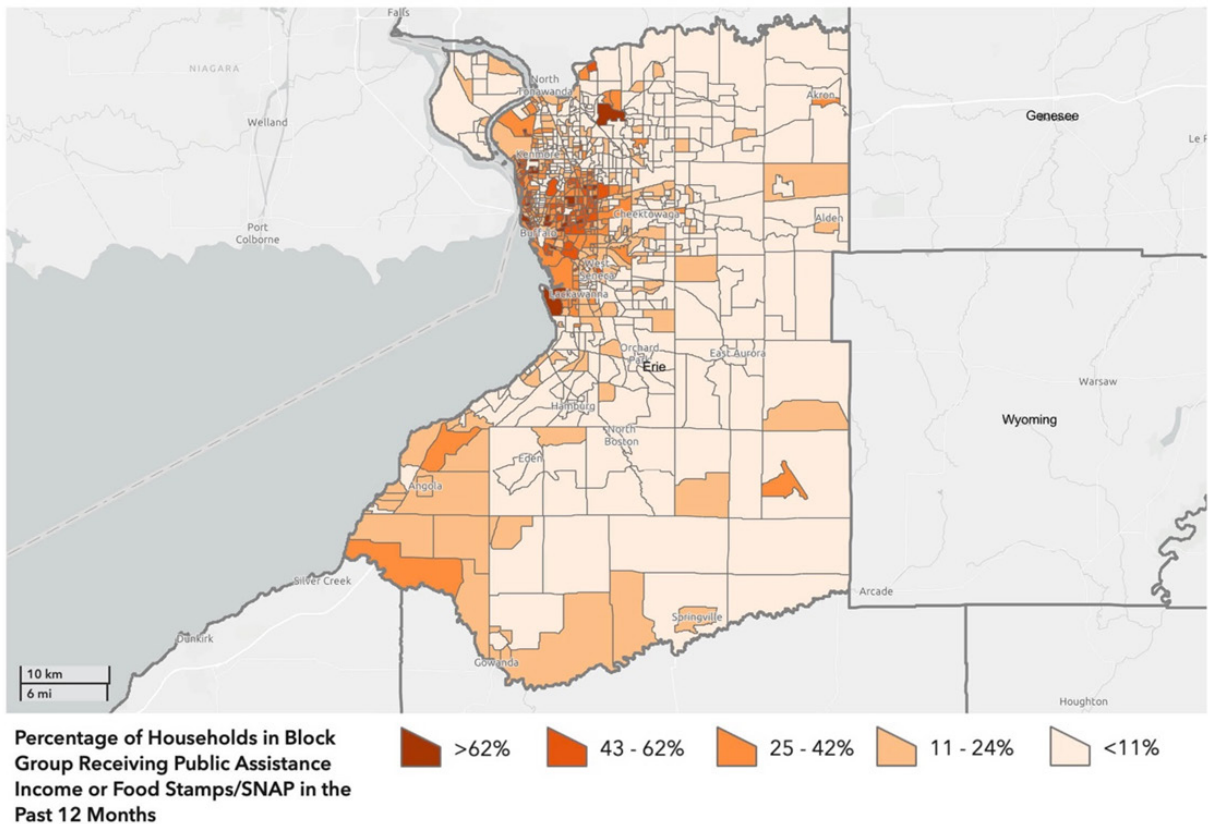


Percentage of Households in Block Group Receiving Public Assistance Income or Food Stamps/SNAP in the Past 12 Months

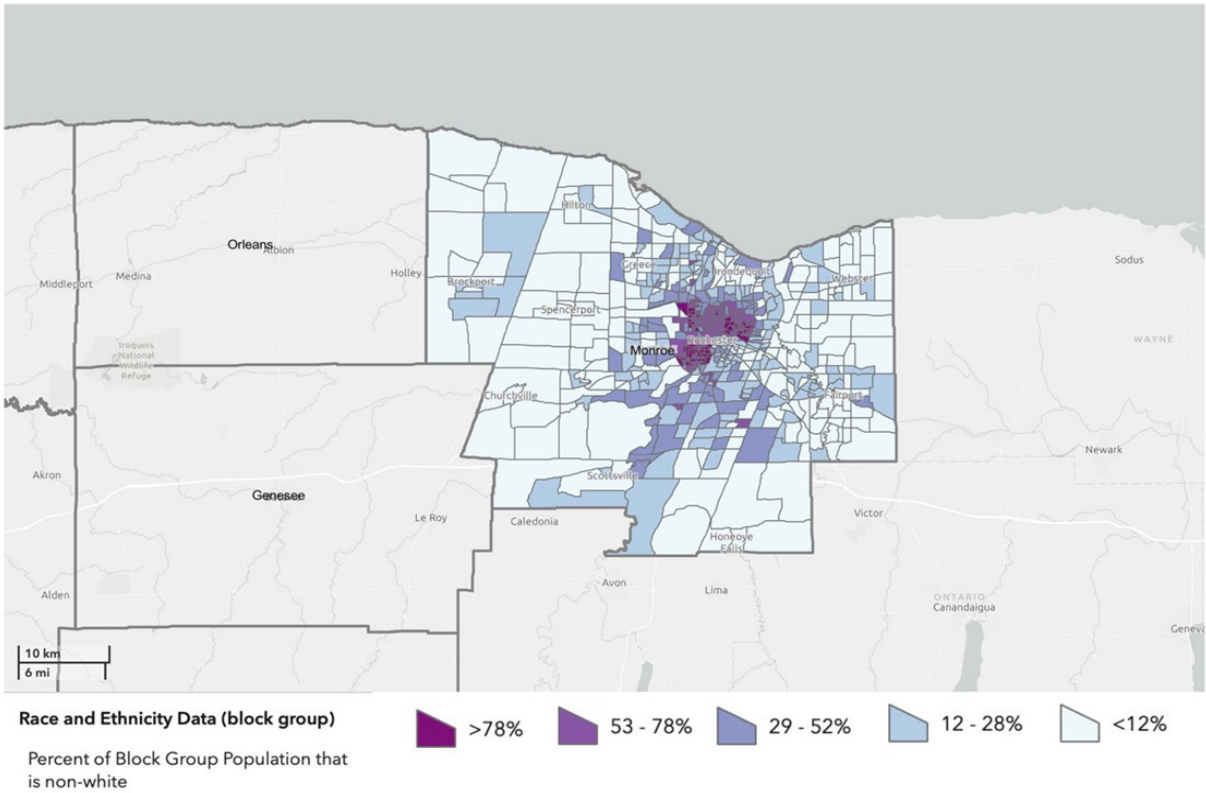
Map 5: 9-county region of Western New York showing the percentage of households receiving public assistance or food stamps/SNAP



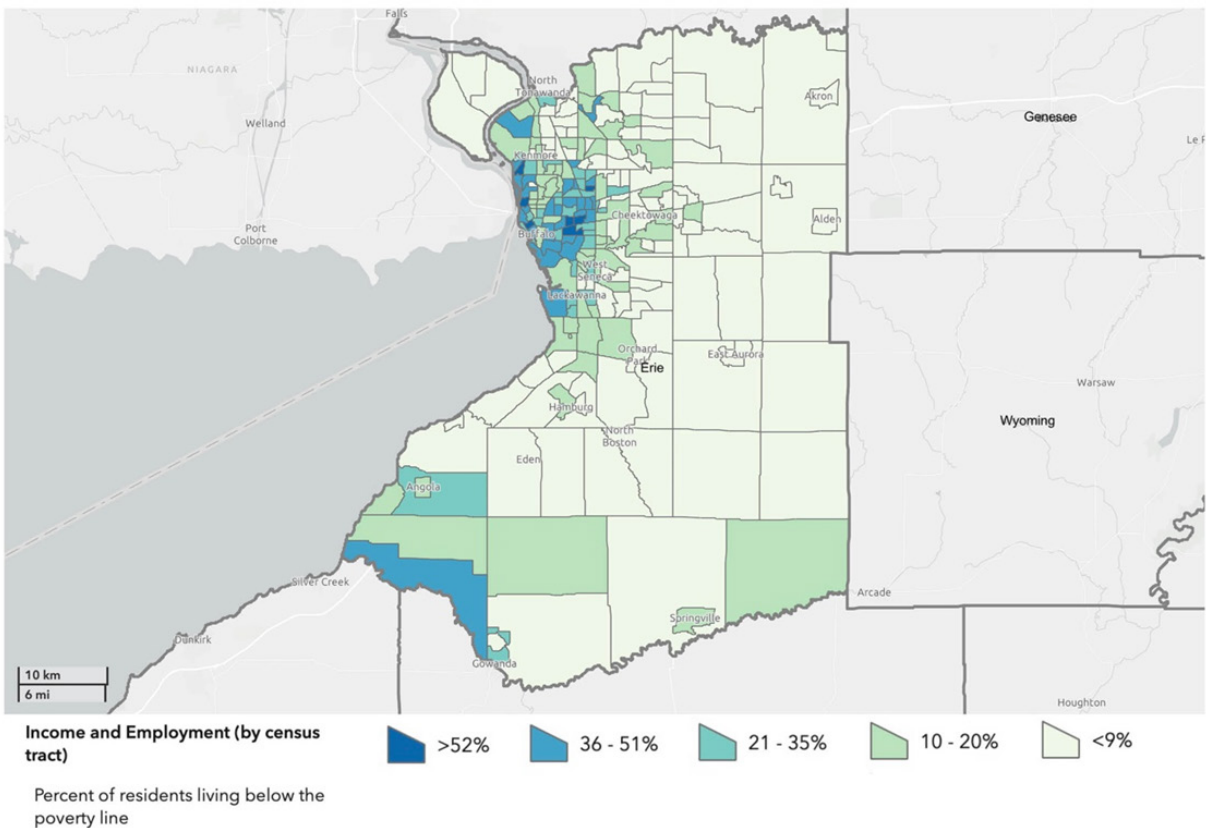
Map 6: 9-county region of western New York showing the percent of population that is non-white.



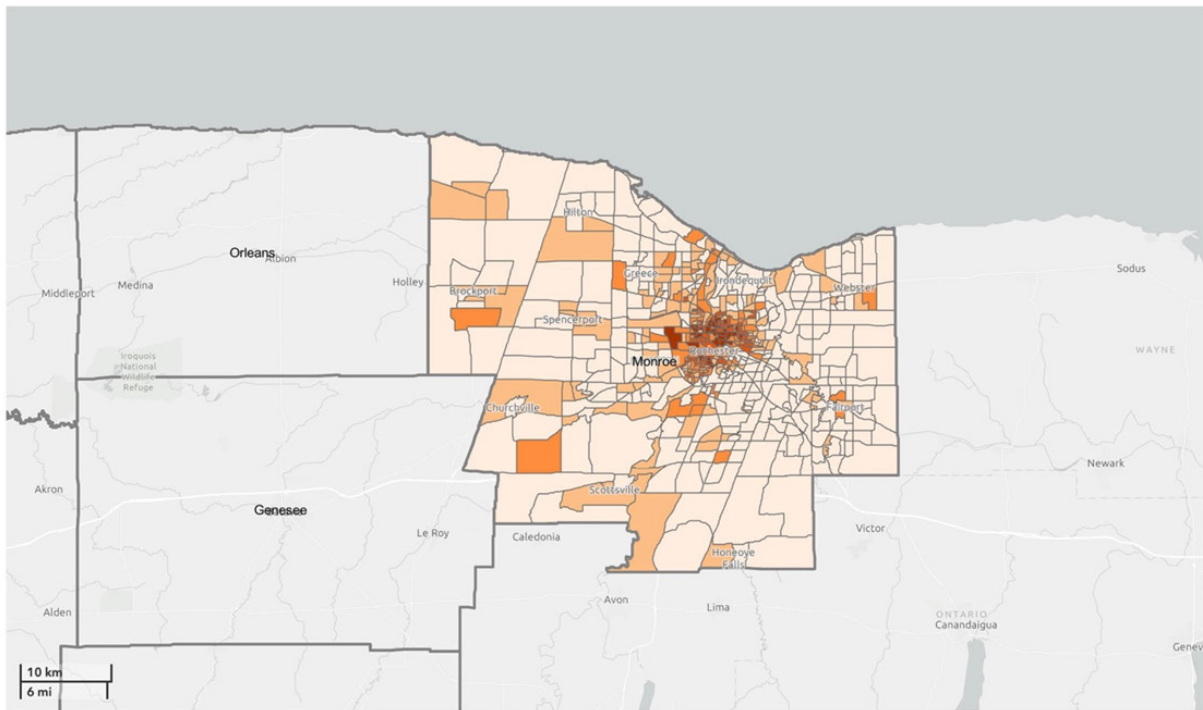
Map 7: Erie County and Buffalo showing the percentage of households receiving public assistance or food stamps/SNAP.



Map 8: Monroe County and Rochester showing the percent of population that is non-white.



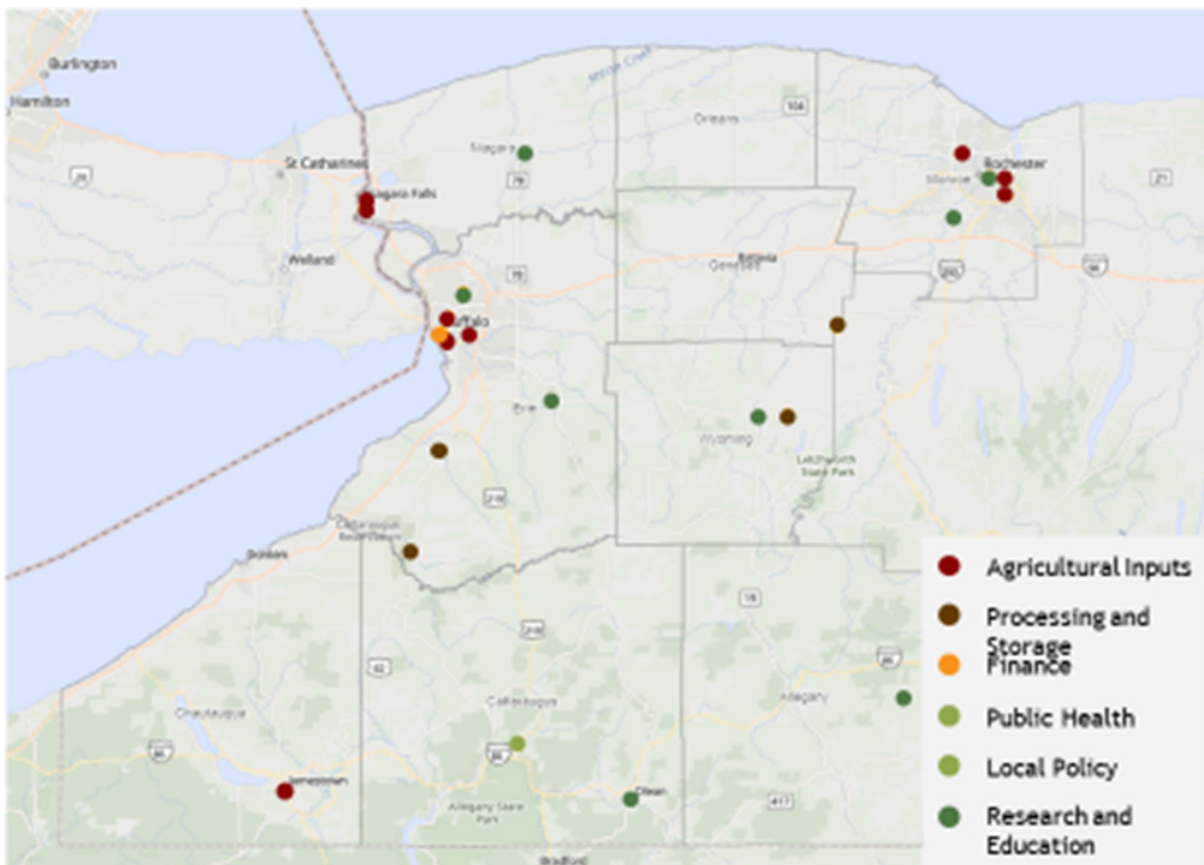
Map 9: Erie County and Buffalo showing the percent of residents living below the poverty line.



Percentage of Households in Block Group Receiving Public Assistance Income or Food Stamps/SNAP in the Past 12 Months



Map 10: Monroe County and Rochester showing the percentage of households receiving public assistance or food stamps/SNAP



Map 11: The geographic locations of RAC members, stakeholder diversity and the food system sectors. RAC map presentation based on Geography

2. SWOT Diagram and Tables

Table Below: Abbreviated Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis for Increasing Access, Equity, and Sovereignty.

Building the understanding of and capacity to address issues of equity in the food system will be an ongoing process for NYSAWG as an organization, the RC, the Work Groups and other decision-making participants in Food Future WNY.

This matrix is a comprehensive S.W.O.T. for understanding who and how to recruit stakeholders to advance the Western New York Food System Initiative's collective understanding and work on food and racial equity. Included below are some examples of models that reflect the Food and Racial Equity recommendations of the [Access, Equity, and Sovereignty Work Group](#).

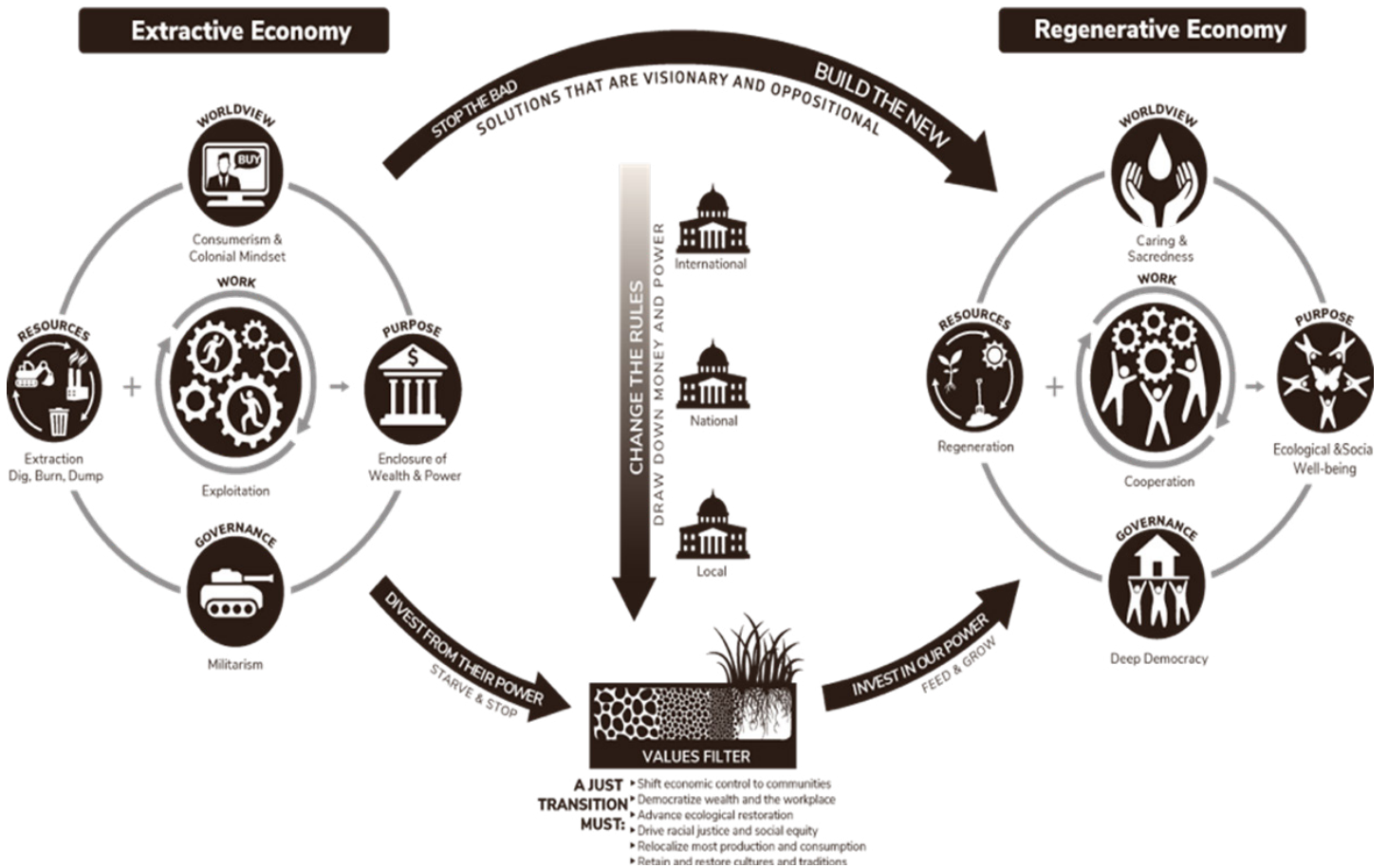
Models	Essence of Model	Strengths	Weaknesses	Impact on Food Access	Application for Local Food System Actors	Regional Examples	Outside region Examples
	Brief statement of what it is	List the key ones	List the key ones	How does this model redefine and diversify food options, production, and distribution styles?	How does it create an improved response to critical food supply challenges and needs?	Name and link	Name and link
Food and Equity Working Groups	A group of Food System leaders meets regularly to provide insight and work together on recommendations and planning for positive, equitable progress in food systems.	Organizers can glean tremendous insight. Participants benefit from forming connections with each other.	Format typically is limited duration and doesn't necessarily lead to action without further commitment. Requires time from BIPOC leaders who already have many demands and requests for their time and participation. At this point there have already been a few of these in the region with lists of recommendations produced. There may not be a need for new working groups at this time unless they are action-oriented and with enough funding support.	Recommendations coming out of these working groups are insightful and accurate. Impact occurs with funding and continued attention and staffing towards the recommendations.	Recommendations and insights coming out of groups of esteemed leaders with lived experience have tremendous potential to create forward momentum, as long as follow up (and funding) occurs.	NY Food and Equity Working Group	
Centering Racial Equity	Centering racial equity can be applied to any task or issue area. It starts with acknowledging the importance of a racial equity lens process and continues with demonstrated commitment.	Brings attention to equity and generates increases in equity. Creates inclusivity. Long term benefits are inevitable when centering equity.	May not move as quickly as other methods that do not center equity. May make more effort to combat entrenched systems, including those that many people are not aware of as dominant systems.	Centering racial equity creates attention and priority in an area that has historically been overlooked. Attention to racial equity will increase equity in many facets.	The response to critical food challenges will be met in a more equitable way using an approach that centers racial equity.		Centering Racial Equity Throughout Data Integration
Racial Equity Steering Committee	Experts have worked with grassroots groups over two years to assess the racial barriers around access to food as well as how to remove those barriers.	Large and diverse stakeholder participation increases chances of network-building, collaboration, and successful change. Supports with capacity and ideas/approaches for those working locally in food systems.	Requires funding in order to bring in experts. Experts coming in may not be familiar with the local specifics.	Needed change can occur with focused funding, experts involved in organizing, attention on the issues, and support specifically for local organizations.			Committee on Racial Equity in the Food System (North Carolina)
Resident Food Equity Advisors	Cohorts of city residents who are selected and then work collectively to drive equitable food policies, receiving training along the way as well.	Temporariness of this position and the compensation received for this position would ensure productivity. Individual community members will have lived experiences and personal relationships with community members that serve as		Community members' input will help inform points where food distribution or production could be altered to improve food access.	The input from community members will help inform food system stakeholders as to how to better respond to supply		Baltimore Resident Food Equity Advisors

		valuable experiences to guide the initiative with. Networking opportunities for community members.			challenges and needs.		
Racial Equity Impact Assessment	An examination of how different racial / ethnic groups are likely to be affected by a proposed action or decision.	Helps minimize unanticipated adverse consequences of actions, proposed policies, institutional practices. Helps prevent institutional racism.	The results are only as good as the level of thoughtfulness that goes into the assessment.	Creates more equity in any context this model is used. Minimizes unanticipated adverse consequences for racial or ethnic groups of actions, policies, institutional practices, budgetary systems, etc.	The response to critical food challenges would be more thoughtful and equitable using this model.		Race Forward
Food Equity Network	Network of individuals seeking to improve the local or regional food economy. Network may gather from time to time or share information digitally. In Buffalo the Network is made up exclusively of people of color.	Gives a space for food system actors and advocates to share information and work together. If made up exclusively of people of color, it is an additionally safe space for actors to participate from the place of shared experience of marginalization of their communities. If using digital communication like a listserv, this may be an efficient way to share information, vs other models that require more regular meetings.	May lack the needed structure to accomplish bigger goals. Concentration on Buffalo may hinder sorely needed cross regional/ business collaborations.	Connections through a Network of concerned individuals is sure to generate ideas and momentum towards any needed change.	A Network is helpful when responding to critical challenges of any nature, including related to food access and food systems. Connections and sharing of ideas and resources will lead to better outcomes.		Buffalo Food Equity Network/Food For The Spirit
Racial Equity Tool / Toolkit	Racial equity tools provide a structure for consideration of racial equity in decisions, policies, practices, programs, and budgets.	Can help to develop strategies and actions that reduce racial inequities and improve success for all groups Brings racial equity explicitly into decision making in order to avoid perpetuating racial inequalities. Identifies clear goals and measured outcomes. Engages community. Has a structure that can be followed including questions to answer while evaluating and making decisions or plans.			Actions and decisions would be more equitable using the structure of a Racial Equity Tool.		Government Alliance on Racial Equity
Food Security Network	Membership model for individuals, families and organizations. A way of grassroots, community-based organizing towards building food security, food justice and food sovereignty for the local population. (Food Security - when all members of a community have easy access to adequate amounts of affordable, nutritious, culturally appropriate food)	Membership generates revenue in addition to grant funding. Community-based and grassroots ensures participation of those most impacted by existing systems. Flexibility as to what the network can do. It can be running a farm and farmstand together, youth programming, educational outreach, etc.		Food can be produced by the network as they do in Detroit. Members can drive the production decisions and reap the benefits of the harvest, any proceeds from a farmstand and the increased sovereignty. Can be a community-centering organization.	A membership base is a powerful tool towards addressing challenges in new ways.		Detroit Black Food Security Network
Food and Racial Equity Fund	A network of philanthropists who learn and take action together, often in consultation with community partners.	Encourages collaboration across more disparate geographies than if one local funder were driving decisions. The magnified power of multiple funders working together, including more dollars towards projects	Could be slow moving depending on governance structure for decision making and how regularly the group meets. Funding decisions are at the discretion of the private group.		Groups such as this have potential to be innovative, creative and willing to take risks with philanthropic capital.		Engage NY

3. JEDI Questionnaire, Survey and Results

A Justice, Equity, Diversity, and Inclusion (JEDI) reflections survey was developed and administered to all of the Regional Advisory Council and Access, Equity, and Sovereignty Working group members to understand the JEDI infrastructure at their respective businesses/workplaces/organizations/farms. The first step in a process to ensure the principles are integrated into the development and implementation of the new WNY Food Systems Initiative/work plan and recommendations. [RAC JEDI Guiding Principles Follow-Up \(google.com\)](#)[RAC JEDI Guiding Principles Follow-Up \(google.com\)](#)

India Walton, a member of Cooperation Buffalo shared the Just Transition values filter to keep accountability to the communities they serve, work must pass through the following Values Filter: 1. Shift economic control to communities; 2. Democratize wealth and the workplace; 3. Advance ecological restoration; Drive racial justice and social equity; Relocalize most production and consumption; Retain and restore cultures and traditions. India Walton presentation: Prioritizing BIPOC Food System Actors.



AES Networking-Coordination-Cooperation-Collaboration Continuum

Definition	<p>Networking Exchanging information <i>and ideas</i> for mutual benefit. This common type of exchange occurs when two professionals exchange business cards; when a meeting opens with members' descriptions of what's new at their organizations; or when a neighborhood gathering begins with a check-in. In a networking exchange, we hear news about opportunities for ourselves or for our clients: staffing changes, program development, clinic hours, and so on.</p>	<p>Coordinating Exchanging information <i>and ideas</i> for mutual benefit, and altering activities to achieve a common purpose. Coordination builds on networking by adding behavior, <i>modifying activities</i>, and focus, <i>mutual benefit and a common purpose</i>. Coordination increases efficient use of resources and the ability to meet community needs. A lack of coordination creates significant problems. Resources are wasted and the community misses out.</p>	<p>Cooperating Exchanging information <i>and ideas</i> for mutual benefit, and altering activities and sharing resources to achieve a common purpose. Cooperation builds on the exchanges of networking and coordination and adds to the new concept of <i>sharing resources</i>.</p>	<p>Collaborating Exchanging information for mutual benefit, altering activities and sharing resources, and enhancing the capacity of another to achieve a common purpose. <i>This can include contracting with one another or working together on projects.</i></p> <p>This already includes the concepts of <i>exchanging information, modifying activities, sharing resources, and having a common purpose</i> and adds enhancing the capacity of another for mutual benefit and to achieve a common purpose by sharing risks, resources, responsibilities, and rewards.</p>
Relationship	Informal	Formal	Formal	Formal
Characteristics	Minimal time commitments, limited levels of trust, and no necessity to share turf; information exchange is the primary focus.	Moderate time commitments, moderate levels of trust, and no necessity to share turf; making access to services or resources more user-friendly is the primary focus.	Substantial time commitments, high levels of trust, and significant access to each other's turf; sharing of resources to achieve a common purpose is the primary focus.	Extensive time commitments, very high levels of trust and extensive areas of common turf; enhancing each other's capacity to achieve a common purpose is the primary focus.
Resources	No mutual sharing of resources necessary	No or minimal mutual sharing of resources is necessary	Moderate to extensive mutual sharing of resources and some sharing of risks, responsibilities and rewards.	Full sharing of resources, and full sharing of risks, responsibilities, and rewards.

The table below reflects the Access, Equity, and Sovereignty working group Primary Intervention: **Improve local response to community food needs and supply challenges** and prioritizes interventions that impact Individual, Intellectual, Social, Natural, Built, Political, and Financial Wealth across the 9-County region. *In contrast to traditional supply chains which often start with what we have and then go looking for a place to sell it, value chains engage the demand side in the development of the supply so that **when we get to the “selling” part, we are just connecting with a market that already knows us and wants what we have - and may have even invested in its development.** “Values” are the benefits we cherish, including employment and income, social connections, creativity and innovation, productive environments, good health, and knowledge, among others.*

Access, Equity, and Sovereignty Working Group Primary Intervention

Value Chain of Food, Health, and Community Wealth Building

Completed March 2022

<p>Access, Equity, and Food Sovereignty Work Group</p> <p>Type of Community Wealth</p>	<p>INTERVENTION</p> <p>Improve local response to community food needs and supply challenges</p>
<p>Individual</p>	<ul style="list-style-type: none"> • Food System Actors learn how to design and implement a community food resiliency program, making sure local action plans are designed and executed properly, community food assessments are conducted, and how to efficiently meet needs while eliminating waste; • Culturally-relevant, local food nutrition, and farm and food systems education
<p>Social</p>	<ul style="list-style-type: none"> • Increases collaboration and knowledge-sharing among Food System Actors along the value chain • Develops a defined network to strategically coordinate practice, action and policy to tackle the issue of food poverty in High Priority Food Areas (HFPAs)
<p>Intellectual</p>	<ul style="list-style-type: none"> • Understanding High Priority Food Areas and expectations for how community food supply needs meet with small scale farming producers and the wider food system. • Establishes a Food and Racial Equity Leadership Council
<p><u>Natural</u></p>	<ul style="list-style-type: none"> • Provides the active involvement of local individuals and businesses in conserving and preserving their natural resources (diverting food waste) • Establishes ownership control models such as Conservation Easements, Trusts, Cooperatives etc. for reliable access to land,
<p><u>Built</u></p>	<ul style="list-style-type: none"> • Provide a demonstration of the value of culturally relevant food production, alternative distribution and retail models, more and improved corner store opportunities, authentic value added for small producers and processing, • Facade Improvements, Online Marketplace Created, Kiosks, etc. • Build social network technology
<p>Political</p>	<ul style="list-style-type: none"> • Training such as what the UB Food Lab organized • Policy planning mechanism for community food security • Action plans • See Policy Meeting writeups
<p>Financial</p>	<ul style="list-style-type: none"> • Pathway for earnings and living wage provided • Invest in cross-sectoral partnerships that deepen community-based well-being efforts and access and strengthen community food resilience networks (to further embed in Healthy Food Priority Areas (HFPAs). • Increase ownership models • Savings from improved health • Fund for Food and Racial Equity

Justice, Equity, Diversity, and Inclusion (JEDI) Survey Questions

Dear Council Members,

We learned during past RAC meetings that many Council members want to explore Justice, Equity, Diversity & Inclusion (JEDI) to better understand the deeper issues we are facing in our food ecosystem, outline our efforts for best solutions, and engage in meaningful conversation and learning.

The AES Working Group would like to organize a series of JEDI Food System sessions. Below is a brief poll to try to establish when and where. When we have narrowed the time frame and the JEDI topics of interest to RAC members and **working groups**, we will send a subsequent poll to make a final selection.

1. First Name *
2. Last Name *
3. Would you be interested in participating in JEDI Food System sessions? *
 - Yes
 - No
 - Maybe
4. When and where should JEDI Food System sessions be held? Please choose from the following times. You may choose more than one. *
 - During RAC monthly calls
 - During RAC Working Group calls
 - After regular business hours (9am-5pm)
 - On weekends
5. When and where should JEDI Food System sessions be held? You may choose more than one. You will have an opportunity to list up to 3 locations later in the survey. *
 - Virtually - with the use of Zoom or Microsoft Teams
 - Virtually - with the use of conference calling
 - In person during local site visits or community engagement events
 - In Western New York
 - Other
 - If other, Where else? *
6. Please rate the following attribute of a JEDI Food System session : ties to the mission and performance objectives of my food system business or organization. *
7. Please rate the following attribute of a JEDI Food System session : ties to the mission and performance objectives of the Western NY Food System's Regional Advisory Council (RAC) *
8. Please rate the following attribute of a JEDI Food System session : advocate for all marginalized populations and understand the intersectionality of these issues within the food system. *
9. Please rate the following attribute of a JEDI Food System session : inviting diverse voices in, valuing them and ensuring they shape a strategy or plan. *
10. Please rate the following attribute of a JEDI Food System session : participation is on a level playing field *
11. Please rate the following attribute of a JEDI Food System session : reflecting on past actions and behaviors and identifying how to take action to mitigate them. *
12. JEDI Topic 1 - Please recommend the topic. *

4. **Photos:** Rural and urban site visits and projects that are BIPOC led which address social disparities of health through community-based programs and strong sovereign food models.











5. Report Readings and Resources

General:

- a. [Food Access Resource Map - USDA](#)
- b. [USDA Food Access Awards 2021](#)
- c. [Get The Good Stuff NYC](#)
- d. [Link Up Illinois](#)
- e. [New Mexico, Community Outreach and Patient Empowerment Program](#)
- f. [Why Hunger - Report on Hunger Relief](#)
- g. [Why Hunger-Food Access Problems need Food Justice Solutions](#)
- h. [Future of Workers](#)
- i. [9 Solutions for Racial Inequity in NY State Agriculture](#)
- j. [Black Farmer Fund Presentation \(meeting with Commissioner Ball 2019\)](#)
- k. [Scaffolded Anti Racist Resources-Buffalo Center for Health Equity](#)
- l. [Food Crisis Sanctions Russia Ukraine Climate](#)
- m. [The Harder We Run: The State of Black Buffalo in 1990 and the Present | Center for Urban Studies](#)

Buffalo/Niagara Counties:

- a. [Growing Together Niagara Falls](#)
- b. [Buffalo - East Side Neighborhood Plan](#)
- c. [Create a Healthier Niagara Falls Collaborative](#)

Chautauqua County:

- a. [Cultivating Prosperity in Chautauqua County](#)
- b. [Bridging Divides: Opportunities for Connecting Farmers and Underserved Consumers in Chautauqua County, NY](#)

Monroe County:

- a. [Rochester Food Policy Council](#)
- b. [Monroe County Planning](#)
- c. [Race and Ethnicity in the Nine County Rochester Area](#)

Indigenous Literature:

- a. Food Sovereignty Resource - [Tribal Food Sovereignty Resource Directory | NCAI](#)
- b. Land-based agricultural resources are vital to the economic and social welfare of many Native American and Alaskan Tribes:
<https://www.indianag.org/?msclkid=1f26bd12c26c11ec9292b198f7b26526>
- c. The Intertribal Agriculture Council was founded in 1987 to pursue and promote the conservation, development and use of our agricultural resources for the betterment of indigenous people. Land-based agricultural resources are vital to the economic and social welfare of many Native American and Alaskan Tribes. The harmonies of man, soil, water, air, vegetation and wildlife that collectively make-up the American Indian agriculture community, influence our emotional and spiritual wellbeing. Prior to 1987, American Indian agriculture was basically unheard-of outside reservation boundaries.
- d. Since that time, IAC has grown to prominence in Indian Country and among the federal government agencies and the agricultural field with which it works on behalf of individual Indian producers and Tribal enterprises. The IAC has, over the last three decades, become recognized as the most respected voice within the Indian community and government circles on agricultural policies and programs in Indian country.

- e. University Of Arkansas Indig Food and Ag Movement.
- f. 2018 Farm Bill and other Tribal Provisions. [farmbillbrief.pdf \(ncai.org\)](#) Provisions establish programs for which tribal nations/citizens are eligible for funding/technical assistance.
- g. Indian country community asset directory: [Indian Country Community Asset Directory](#)

6. **Interviews**

From July 2021 to June 2022, seventy-two combined online and in person interviews were held. See AES Full Participant Contact List. [Unlocking a Diverse Food Future: Community Self-Reliance and Social Justice as Drivers of Change, By Euneika Rogers -Sipp.](#)

7. **Site Visits**

The Access, Equity, and Sovereignty Work Group co-designed several site visits.

Locations and hosts for site visits:

- a. Buffalo Food Equity Network (BFEN) July 2021
- b. Dinner held by Justice for Migrant Families WNY
- c. Seneca Nation of Indians host and Farm Tour
- d. Healthy Corner Store Initiative Buffalo
- e. PUSH Buffalo Office
- f. Providence Farmers Collective
- g. Visit to MAP, Social Justice Work Group Launch*
 - *This was the launch of the AES work group and what the AES workgroup was named at the time and has since changed to Access, Equity, and Sovereignty (see questionnaire sent to AES Workgroup Members)
- h. Buffalo urban farmer visit and community gathering
- i. Rochester Area Community Foundation
- j. Buffalo urban farmer visit and community gathering
- k. African Heritage Coop meeting
- l. Buffalo area funder meeting
- m. The Chautauqua Food Policy Council in Jamestown
- n. RAC Strategy Meeting: 42 North, East Aurora

The workgroup, on September 30, 2021, also co-designed with Mike Snyder a Food Sovereignty Tour and facilitated Discussion at [Gakwi:yo:h Farms](#), with 15 participants (including four RAC members who also attended Tara Ellis, Allison Dehonney, Rebekah Williams, and Linnea Carlson).

8. Work Group Meetings

The Access, Equity, and Sovereignty Workgroup was originally established during a Regional Advisory Council (RAC) Meeting June 2021 with the help of 5 RAC members. The original workgroup name was Food, Access, and Social Justice (FASJ) and after several iterations became Access, Equity, and Food Sovereignty (AES). See Final Report under Methodology: Work Groups.

1. There was a survey conducted with workgroups meeting after its official launch to determine the final name.
 2. A Work Plan was established that identified priorities. See website [RAC Members Portal - WNY REGIONAL FOOD SYSTEM INITIATIVE \(foodfuturewny.org\)](https://www.foodfuturewny.org)
7. Active participants in work group There are active work group participants (attending all bi-weekly meetings) and some members who participate according to capacity.

April 26, 2022 Access, Equity, and Food Sovereignty Work group meeting focusing on Policy

The Access, Equity, Sovereignty Work Group (AES WG) is putting together a compendium of policy ideas/ initiatives that the WG believes should be prioritized and pursued to achieve a more resilient and equitable food system that ensures food access for historical marginalized communities and amplifies the roles and voices of BIPOC and vulnerably made Food System Actors.

“We are most concerned about the east side (specifically Fruit Belt) and Black Rock Riverside gardens right now re: conservation/protection in land trust as those are both high areas of development...we want to see the land protected from development so there is always space in each district for free growing of produce for community members...”

- Jeanette Koncikowski, Director Grassroots Gardens

Prioritizing BIPOC food system Actors:

Three collaboration learning sessions hosted by the Access, Equity, and Food Sovereignty Work Group (AES WG) of the food futures WNY initiative from March 22, 2022 – May 31, 2022. Prioritizing under-resourced communities and BIPOC Food System Actors to better respond to local food needs and supply challenges.

- Rita-Hubbard Robinson, Sheila Bass, LISC, Jericho Road, Simeon Banister, Michael Snyder, Michael Shuman, Rebekah Williams, Harper Bishop, Rita-Hubbard Robinson, Elias Martinex, Ignacio Villa, Alexander Wright, India Walton, Ismail Samad

APPENDIX M: College and University Procurement Contact List

Organization	Invitee	Contact Info	Notes
Colleges and Universities			
University of Rochester	Cam Schauf	Director of Campus Dining Services University of Rochester 585-275-8757 cschauf@services.rochester.edu	Retired summer of 2022. Contact through Headwater Participated in Sept 21 working meeting
University at Buffalo	Eric Blackledge	Executive Director of FSA Eb8@buffalo.edu	
Buffalo State (SUNY)	Darryl Hauser	Darryl Hauser Director of Operations Darryl.Hauser@compass-usa.com (716) 878 - 4365	Chartwells (Compass Group)
SUNY Geneseo	Mat Felthousen, ED Tom D'Angelo	mfelthousen@geneseo.edu dangelo@geneseo.edu	Participated in Sept 21 working meeting
St John Fisher College	Wade Griffin	Wade Griffin Chef de Cuisine Dining Services St. John Fisher College Office (585)385-8332 Cell (585)317-9318 bryant.griffin@compass-usa.com	Participated in Sept 21 working meeting
SUNY Brockport	Cathy Legacy	Director of Dining Services at Brockport Auxiliary Service Corporation	The Brockport Auxiliary Service Corporation is contracted by The College at Brockport to provide and manage dining services, the bookstore, catering

			cathy.legacy@basc1.org (Best method of contact) 1-585-410-1905	services, laundry services, vending services, ATM's, events and conferences, campus ID services, and debit card program.
SUNY Fredonia	Dean Messina		Director of Dining Services at Faculty Student Association 716-680-6268 dean.messina@fredonia.edu	Faculty Student Association is responsible for dining services at Suny Fredonia
SUNY Morrisville	Sarah Mazza		Director of Dining Services mazzas@morrisville.edu 315.684.6843	
SUNY College of Env Science (Syracuse)	Sarah Mazza is the contact for Suny ESF as well		Same as above	(Suny ESF dining services is covered by Suny Morrisville)
Niagara University	Anthony Renda		Regional Executive Chef arendan@niagara.edu 716-286-8793	
Villa Maria College	Tony Ruisi		GM/Exec Chef at Metz Culinary Management ma4059@metzcorp.com 716-961-1812	Villa Maria has Metz Culinary management take care of their dining services
Hilbert College	Jessica Lively		Head of Dining Services 716-926-8810 jessica.lively@hallmarkdining.com	
Empire State College (various campuses)	Jeff Kurto		Senior Director of College Operations at SUNY Empire State College 518-587-2100 ext. 2277 jeffery.kurto@esc.edu	Empire State apparently doesn't have dining services. Initial contact to reach out to

Canisius College	John Tychinski	Director of Dining Services tychinski@canisius.edu 716- 888 - 3159		
Rochester Institute of Technology	Donald LaFlam Herlan Manurung	Sr. Director of Operations, Culinary and Retail dsfsc@rit.edu 585-475-7455 hxmfsn@rit.edu		Herlan participated in Sept 21 working meeting
Suppliers				
Headwaters Food Hub	Chris Hartman	chris@headwaterfoodhub.com		Participated in Sept 21 working meeting
Eden Valley Growers	Dave Walczak	dw@edenvallygrowers.com		Participated in Sept 21 working meeting
Produce Peddlers (last mile delivery	Gina & Gary Wiczorek	gina@producepeddlers.com & gary@producepeddlers.com		Participated in Sept 21 working meeting
Fruit Fresh Up (processor	Tiffany Tycz	ttycz@fruitfreshup.com		
James Desiderio (produce distributor),	Nick Desiderio	nickd@jamesdesiderio.com		
American Fruit and Veg (produce distributor)	Justin Fields	jfields@afvnys.com		
Farm Fresh First (perhaps?	Mike Gardinier	mgardinier@farmfreshfirst.com		
Bipperts (distributor & farmer)	Barb Dygert	bippertsfarms@yahoo.com		
Brigiattas, Retail Produce Market, Delicatessen, Greenhouse & Wholesale Produce	Jim Gallbato	414 Fairmount Avenue Jamestown, NY 14701 Call: 716-483-1916		
JH Dodman	Todd Pohlman	todd@jhdodman.com		Participated in Sept 21 working meeting

Other				
CCE Harvest NY	Becky O'Connor and Cheryl Belinski	rao84@cornell.edu cbt32@cornell.edu		CCE Harvest has considerable experience and resources addressing procurement
Food Policy Council of Buffalo and Erie County	Antonina Simeti	Chair of Food Policy Council asimeti@gmail.com BPI Program Director, asimeti@buffalopurchasing.org		Council has a procurement subcommittee and Antonina is also the coordinator for the Buffalo Procurement Initiative
Buffalo Niagara Medical Center	Marla Guarino	Associate Director of Health and Well-being mguarino@bnmc.org www.bnmc.org		Operated pilot program with hospitals in local food procurement

APPENDIX N: Sample of Priority Policies related to Farming and Agriculture

Proposed Policy	Local, County, State, Federal?	Relevant Contextual Background	Policy Avenue (charter, ordinance, law, act, etc..)
<p>Support for S.7534/A.8580 to amend NYS Municipal law 103 Provides that certain purchase contracts can be awarded to a qualified bidder who fulfills certain values based procurement standards when such bid is not more than 10% higher than the lowest responsible bidder and when the bidder makes publicly available data on where such bidder sources their food items and sets forth the criteria for values based procurement standards to include local economies, environmental sustainability, valued workforce, valued agricultural workforce, animal welfare, nutrition, and racial equity.</p>	<p>State</p>		

<p>Establishing a mobile market permit thru NYS Ag & Markets</p>	<p>NYS</p>	<p>Mobile markets provide organizations, health centers, and businesses the opportunity to provide fresh food markets in food insecure neighborhoods. However, there is no state mobile market permit presently. MM have permit barriers and confusion as no one permit covers their operations compared to a mobile food truck.</p>	
<p>Updating hydroponic laws to allow aquaponic / hydroponic growers the opportunity to slaughter and sell their hydroponic fish</p>	<p>NYS</p>		
<p>Revise state property tax laws tied to agricultural land (including in urban areas) to provide a tax credit for food and farming businesses</p>	<p>NYS</p>		
<p>Subsidized health insurance for farmers</p>	<p>NYS</p>		
<p>Support and expand the emergency food network so states, food banks and local organizations can reliably serve their communities from produce provided by farmers. Providing a tax credit for their donated</p>	<p>NYS</p>		

produce at retail value subsidized by the state			
Cottage Food Law Deluxe - allowing small-scale and new producers to use appliances in their homes to bake, cook, can, pickle, dry or candy certain low-risk foods for sale without being held to regulations for the first 2-year	NYS		
Establishing an Office of Urban Agriculture & Food Sovereignty in the City of Buffalo	Local	Buffalo's Office of Strategic planning does not have the capacity to handle food systems policy and planning. There should be an office devoted for matters related to urban ag and food sovereignty	Buffalo's Office of Strategic planning does not have the capacity to handle matters related to food systems policy and planning. There should be an office devoted for matters related to urban ag and food sovereignty
Adding Buffalo zoning code for "community-operate space" and "urban agriculture"	Local	All land presently being farm on in Buffalo is zoned as vacant residential land	
Expand Agriculture Tax Credit programs for urban farmers	Local	Only possible when the county is updating their tax code	
Adopting Good Food Purchasing Program	Local	Establishes value-based food procurement standards	
Adopt resolutions to support Community Land trusts.	Local / County	Grassroots Gardens and Fruit Belt Community Land trusts in Buffalo are seeking city	

		resolutions to support policies from their respective land trusts	
Support the Farm System Reform Act of 2021	Federal	places a moratorium on CAFOs and reinstates the mandatory country of origin labeling for beef and pork. https://www.govinfo.gov/app/details/BILLS-117s2332is	
Redirect subsidies from commodity crops (ie. corn and soy) to nutritious produce.	Federal		
Remove renewable fuel standards and biofuel subsidies. Thus reducing corn production for energy use rather than food.	Federal		
Supporting the Food is Medicine Coalition policy priorities	Federal		http://www.fimcoalition.org/policypriorities
Right of First Refusal for Farms	State	Selling to developers, there should be legal required opportunities for food-system advocates—whether land banks, land trusts, food hubs, etc.—to buy the property.	

