



## NEEDS ASSESSMENT OUTCOMES REPORT

### Introduction

This Outcomes Report is a synthesis of findings from a needs assessment conducted by New York University (NYU) and reported in “Farm to School Producer Training Needs: A Review” (referred to in this report as the “Needs Assessment”) and USDA Food and Nutrition Service (FNS) feedback. This Outcomes Report aims to clearly demonstrate how the information from the Needs Assessment will be applied to enhance the farm to school producer training program curriculum, *Bringing the Farm to School: A Toolkit for Agricultural Producers*. The curriculum will be implemented under a train-the-trainer model. State agency staff and farmer support organization representatives will be trained on how to use the curriculum at local producer trainings in their communities. The Outcomes Report outlines key findings from the Needs Assessment, including emerging themes around producer training needs and motivations related to farm to school, how the curriculum addresses those needs, and makes additional recommendations for consideration in the train-the-trainer program and producer training workshop development.

### Project Overview

The goal of the project, *Bringing the Farm to School: A Toolkit for Agricultural Producers*, is to help all agricultural producers (farmers, fishers, ranchers and food processors) build their capacity to launch or expand efforts to market to schools, therefore increasing farm to school activities in schools and communities across the nation.

#### *Project Structure*

The project was launched in Spring 2019 and is anticipated to run through Fall 2021 with activities organized in four phases: needs assessment, curriculum development, regional train-the-trainer workshops, and local producer trainings. Using a tiered, train-the-trainer model, this project aims to prepare State agencies and other representatives with the knowledge and skills necessary to implement the developed trainings in their states among agricultural producers on key farm to school topics.

#### *Key Project Partners*

#### **United States Department of Agriculture, Food and Nutrition Service, Office of Community Food Systems**

USDA FNS Office of Community Food Systems (OCFS) helps child nutrition program operators incorporate local foods in the National School Lunch Program and its associated programs, as well as the Summer Food Service Program and Child and Adult Care Food Program. OCFS accomplishes this through grant making, training and technical assistance, and research.

#### **National Center for Appropriate Technology - Project Co-Lead**

For more than four decades, NCAT has helped individuals and communities adopt local solutions that encourage self-reliance, prepare for uncertainties, and create a cleaner, healthier future for all. A national nonprofit organization with headquarters in Butte, Montana, NCAT has six regional offices that provide hands-on assistance. NCAT energy programs help businesses, communities, homes, and farms



conserve energy, reduce pollution and costs, and maximize efficiency. Its agriculture programs help growers reduce costs, maximize profits, and preserve the land.

### **National Farm to School Network - *Project Co-Lead***

National Farm to School Network is the leading voice for the U.S. farm to school and farm to early care and education movement, working as an information, advocacy and networking hub for communities to bring local food sourcing, gardens, and food and agriculture education into schools and early care and education settings. National Farm to School Network works at the local, state and national levels to expand and sustain the number, quality and impact of farm to school and farm to early care and education initiatives across the country.

### **New York University - *Independent Evaluation***

Experienced farm to school researchers at New York University (NYU) will lead the needs assessment and evaluation of this project. NYU will be responsible for developing all monitoring and evaluation processes and tools, conducting data analysis and interpretation.

### **Advisory Council**

An Advisory Council has been established to support the work of this project. Advisory Council members will identify existing resources, contribute content and review the curriculum, promote in-person and virtual trainings, and host trainings where appropriate. The Advisory Council is comprised of organizations around the country that work with diverse producer stakeholders and audiences. These organizations include: producer support organizations, State agencies, Extension programs, and groups representing historically disadvantaged farmers and those representing veterans. The following organizations are represented on the Advisory Council:

- Center for Integrated Agricultural Systems - Wisconsin
- Community Alliance with Family Farmers
- Cornell College of Agriculture and Life Science
- Farmer Veteran Coalition
- Georgia Organics
- Intertribal Agriculture Council
- Michigan State University
- National Farmers Union Foundation
- National Young Farmers Coalition
- North Dakota Department of Public Instruction
- State of Washington Department of Agriculture
- Western Montana Growers Cooperative

### **Methodology**

To complete the Needs Assessment, NYU gathered primary data sets from producer surveys, secondary data from national and state level studies related to producer training needs, and nine key interviews with organizations that represent producers and farm to school value chain stakeholders. The collated primary and secondary data provides insight on motivations, challenges, and training needs for producers entering or interested in farm to institution and farm to school markets. The stakeholder interviews were designed to contribute to our understanding of motivations and challenges and also provide direct feedback on the curriculum outline proposed by the National Center for Appropriate Technology (NCAT) and the National



Farm to School Network (NFSN). Evaluators collected and analyzed this data and utilized findings to offer recommendations for curriculum content and training approaches. Although the studies on which the Needs Assessment drew from were conducted in different locales at different times, it provides the most current and complete available content identifying producers' farm to school training needs and motivations to date. Thus, the Needs Assessment serves as a road map to guide both the curriculum content and training program design with the ultimate goal of engaging producers in farm to school in their communities.

### **Key Research Findings**

While the Outcomes Report uses the Needs Assessment findings and FNS feedback as reference points, please refer to the "Farm to School Producer Training Needs: A Review" Executive Summary (p. 3) and Recommendations (p. 38) for more detailed information. High-level findings on the most relevant topics are summarized below.

#### *Farm to School Market Opportunities*

According to the report findings, farm to school is still a relatively small portion of most producers' markets. However, interest in starting or expanding farm to school sales is high, indicating a strong and timely need for this training.

#### *Producer Motivations*

In addition to assessing producer needs, the datasets and reports included in the Needs Assessment examine producer motivations for engaging in farm to school. Producers cited their top reasons for engagement as a mixture of economic and social aspects. Producers are interested in building relationships with their community and providing healthy food to consumers, as well as diversifying their business by entering or expanding into a reliable school market.

#### *Producer Challenges*

A number of key themes from the Needs Assessment emerged as challenges for producers when starting or expanding farm to school sales:

- price point issues;
- understanding school needs (including procurement requirements and volume needs);
- developing relationships with school markets; and
- food safety requirements.

Additional details regarding identified barriers and relevant curriculum recommendations are expanded on below.

### **Curriculum Recommendations**

The Needs Assessment identified significant trends related to challenges faced by producers when entering or expanding participation in school markets. While analyzing these findings, project partners



identified the “Top 8 Producer Challenges for School Markets” and the curriculum content priorities to address these potential barriers, shown in Table 1. It is important to note that topics outside of the eight identified may be important as well for producers to engage in effective and profitable farm to school sales. The list below intends to indicate what is *mandatory* in the curriculum; however, it is not a guide to a *complete* curriculum.

NCAT and NFSN’s complete curriculum outline includes these Needs Assessment key priorities in addition to other critical content identified by our curriculum team and the FNS Office of Community Food Systems. Additional topics outside of these core areas will be incorporated as supplementary resources to the curriculum as online content.

**Table 1. Curriculum Content Priorities: Top 8 Producer Challenges in School Markets**

<b>1. Seasonal availability: Peak production often does not align with school year</b>
<p><b>Module 4: Growing for Schools</b></p> <ul style="list-style-type: none"> <li>● <i>Section B: Growing for School Menus</i> <ul style="list-style-type: none"> <li>○ <i>Learning Objective:</i> Understand how to identify the products and volume schools might purchase based on the school infrastructure and feeding programs they participate in.</li> <li>○ Content related to findings:           <ul style="list-style-type: none"> <li>▪ Meeting School Needs               <ul style="list-style-type: none"> <li>● Volume, packaging, timing, and delivery capacities.</li> <li>● Crop planning/succession planting to meet needs and seasonal demands.</li> <li>● Ways of filling the processing gap for seasonal availability</li> </ul> </li> </ul> </li> <li>○ Applied Activity: Crop and livestock planning worksheet based on school menus exercise.</li> </ul> </li> <li>● <i>Section C: Crop Production and Planning</i> <ul style="list-style-type: none"> <li>○ Season extension will be briefly discussed with a webinar as a supplementary resource. If the producer audience is mainly crop-oriented, this resource can be used in a classroom setting.</li> </ul> </li> </ul>
<b>2. Price point: Limited school food budgets may result in low purchase price for farmers</b>
<p><b>Module 4: Growing for Schools</b></p> <ul style="list-style-type: none"> <li>● <i>Section A: Business Planning</i> <ul style="list-style-type: none"> <li>○ <i>Learning Objective:</i> The goal of this section is for producers to understand and be familiar with the tools for determining which price point works for their farm or business.</li> <li>○ Content related to findings:           <ul style="list-style-type: none"> <li>▪ The price point topic will be introduced in the producer training sessions as a PowerPoint presentation.</li> </ul> </li> <li>○ Applied Activities:</li> </ul> </li> </ul>

<ul style="list-style-type: none"> <li>○ The producers will fill out a decision tree, which will include price point prompting questions.</li> <li>○ They will receive a “price point exercise” where they take a deeper dive into enterprise cost and return analysis for school markets. This would happen after training and with follow-up technical assistance from regional partners and NCAT’s ATTRA project.</li> <li>○ Myth-busting: Price point case study video featuring farmers marketing to schools addressing the price issue when marketing to schools.</li> </ul>
<p><b>3. Procurement: Navigating school food purchasing processes and regulations</b></p>
<p><b>Module 2: Understanding School Food Procurement Policies and Practices</b></p> <ul style="list-style-type: none"> <li>● Sections A-C address this barrier</li> <li>● <i>Section B: School Food Procurement 101</i> <ul style="list-style-type: none"> <li>○ Content related to findings:           <ul style="list-style-type: none"> <li>▪ Applied Activity: Training activities focus on sharing tools that directly support procurement planning and contract management.</li> <li>▪ Language: Creating shared language between school markets and producers supports new entry into the farm to school market for beginning producers and increases producer capacity to manage their school contracts proactively.</li> </ul> </li> </ul> </li> </ul>
<p><b>4. Food safety: Lack of understanding of school compliance and inconsistency with school food safety requirements</b></p>
<p><b>Module 4: Growing for Schools</b></p> <ul style="list-style-type: none"> <li>● <i>Section G: Food Safety Considerations</i> <ul style="list-style-type: none"> <li>○ <i>Learning Objective:</i> This section will focus on helping producers understand tools to identify school district food safety requirements, with references to the many resources on how to meet them.</li> <li>○ Content related to findings:           <ul style="list-style-type: none"> <li>▪ Applied Activity: Group exercise on finding School Food Authority food safety standards.</li> <li>▪ Individual Activity: Produce farmers identify their food safety risks.</li> <li>▪ Myth-busting: A podcast highlighting discussions with producers and schools that work together to meet food safety requirements.</li> </ul> </li> </ul> </li> </ul>
<p><b>5. Volume requirements: Food volumes are too large or too small (depending on the level of farm to school experience)</b></p>
<p><b>Module 2 Understanding School Food Procurement Policies and Practices</b></p> <ul style="list-style-type: none"> <li>● <i>Section C: Your Food in School Meals</i> <ul style="list-style-type: none"> <li>○ Content related to findings:           <ul style="list-style-type: none"> <li>▪ Power of local autonomy discussion including how local/district policies and school practices impact procurement.</li> </ul> </li> </ul> </li> </ul>

- Applied Activity: A worksheet outlining specifications and how to meet them, including a sample specifications packet.
- Myth-busting: School food quantity requirements.

## 6. Delivery requirements: Frequency, volume, packaging, and processing

### Module 2: Understanding School Food Procurement Policies and Practices

- *Section C: Your Food in School Meals*
  - Content related to findings:
    - Applied Activity: Understanding specifications and common sense approaches to meeting school market standards. Explore common regional products and define using specifications packet.

### Module 3: Marketing and Selling to schools

- *Section C: Product Development: Packaging*
  - Content related to findings:
    - Applied Activity: Producers will identify a product that can be produced for schools based on given demand in pounds per week, number of weeks, packaging requirements, type of processing and price.

### Module 4: Growing for Schools

- *Section C: Scaling up – Packaging*
  - Content related to findings:
    - Discussion and evaluation about scaling up for school markets: How does existing infrastructure tie into delivery and packaging requirements of schools?
    - Applied Activity: Decision trees – Are school markets right for you? This guides producers to the best access point based on goals, infrastructure and scale.

## 7. Producer-buyer relationships: Establishing and maintaining communications and relationships with School Food Authorities

### Module 2 Understanding School Food Procurement Policies and Practices

- *Section B: School Procurement 101*
  - Content related to findings:
    - Mini case studies: Procurement approaches for different market pathways.

### Module 3: Marketing and Selling to Schools

- *Section A: Approaching and Communicating with Schools for Marketing*
  - Learning Objective: To give farmers tools and resources that enable them to focus on their local school district and identify what foods to produce and the schools to connect with.

- Content related to findings:
  - Applied Activity: In groups, producers will identify schools in a specific area in the Farm to School Census involved in farm to school activities.

**Module 5: Farm to School Partnerships and Support**

- *Section D. Networking and Building Relationships with Schools*
  - Applied Activity: Producers will develop an engagement plan for working with schools.

**The Trainers Toolkit**

- Content related to findings:
  - The Toolkit will include a glossary of recommended/commonly used terms for school food markets and producers. This aims to improve communication, reduce barriers and encourages the use of shared language.

**8. Identifying schools that are buying local: Which schools are buying local foods and what are their requirements and guidelines?**

**Module 2 Understanding School Food Procurement Policies and Practices**

- *Section C: Your Food in School Meals*
  - Content related to findings:
    - Applied Activity: Help producers identify Farm to School contact in their region or district through the Farm to School Census.

**Module 3: Marketing and Selling to Schools**

- *Section A: Approaching and Communicating with Schools for Marketing*
  - Learning Objective: Producers will focus on their local community and school district and identify what foods in their product line work best with school menus.

**Training and Curriculum Content: Additional Considerations from the Needs Assessment**

- 1. Addressing the diversity of producers and operations: products, scale, sale experience, management approaches, resources and philosophies.** The Needs Assessment suggests that experienced growers have much to share with beginners and recommends that growers who are interested in selling food to school and growers who have farm to school experience be included in trainings.
  - a. **Content related to findings:**
    - i. NCAT and NFSN suggest addressing this challenge within the train-the-trainer workshops to facilitate engagement with regional stakeholders to define local training priorities.

- ii. Mentor farmers will provide critical opportunities for peer learning during the train-the-trainer workshops, as well as contracted to provide technical assistance (on a limited basis) with growers interested in accessing school markets.
- iii. The Trainer’s Toolkit will provide trainers with multiple resources that they can use to plan and implement producer trainings for a diverse audience, including a best practices tip sheet.
- iv. Curriculum content will be organized as “maps” including topical modules that facilitate easy customization for regional training teams. Content will include learning objectives and activities for beginner (“101”) and experienced farmers (“digging deeper”).

**2. The spectrum of interest levels and motivations requires unique needs and opportunities for engagement. Producers with strong economic motivations may be easier to engage and more receptive to technical assistance.** The Needs Assessment stated this in the review of the 2012 Vermont farmer study pointing out that, “[t]hose that are in the middle (socially motivated producers), researchers suggest, will require more technical assistance to meet the economic realities of school markets” (pp. 16-17).

**a. Content related to findings:**

- i. Supplemental resources (available online) will help producers dig deeper into curriculum areas that feel most relevant and helpful to their unique situation and interests. Each section of the Producer Workbook and Trainer’s Guide will include a “Digging Deeper” section.
- ii. Producers will develop individualized action plans in which they identify and define their farm to school goals, action steps, timeline, and any technical assistance needed.
- iii. Farmer mentors and NCAT and NFSN staff will be providing technical assistance to producers that have a strong motivation in selling to school markets.

**3. States and regions have diverse agro-ecosystems and grower demographics that were not spelled out within the scope of the current Needs Assessment.** Special issues faced by farmers of color, tribal producers, or growers in very remote, rural locations may have to be assessed and addressed on a region-by-region basis.

**a. Content related to findings:**

- o Each of the modules has a section that outlines a proposed approach to regional and cultural differentiation of the curriculum. Some curricula materials will be adapted by trainers for specific regions or enterprises and others will be available as a supplemental resource online. The lesson plans will include a section on regional differentiation and the content will be included online for trainers to access.

**Best Practices for Training Program Design and Implementation**

*Help Trainers Address Diverse Producer Audiences*



The Needs Assessment emphasizes the importance of understanding and engaging producers. Given the diverse producer audiences who will participate in the farm to school trainings, additional informal opportunities for understanding their unique needs at the local producer trainings will enable trainers in customizing to varying producer interests and needs. These opportunities, outlined below, will also inform the curriculum and allow the training experience to evolve and become more effective over time.

Opportunities for identifying training customization may include:

- *Training participant engagement:* During train-the-trainer events, encourage future trainers to identify potential producer audiences. Ask about who they think is most interested in farm to school sales in their region and would be likely to attend a local training event. This question can be prompted by producer grower type, size, and farm to school experience.
- *Local purchasing panels:* Highlight regional examples of local purchasing relationships through producer/buyer panels within train-the-trainer workshops. Hearing directly from producers about experiences selling to school markets will help trainees understand the diversity of producer needs and school foodservice operations.
- *Producer registration:* Registration for local producer training events should include information to help trainers assess producer audiences and customize content that can be geared more closely to meet their needs. Participants may be asked questions about grower type, products, farm size, operations, and farm to school selling experience. Differentiation modules will be accessible online for trainers and will include product-specific and regionally appropriate training content.
- *Myth-busting Case Studies:* Incorporating a series of producer-focused case studies into the curriculum could help producers and trainers understand many common misconceptions about barriers for selling to schools and models of innovative approaches to overcome potential barriers and sustain mutually beneficial farm to school purchasing relationships.

### *Help Producers be Market Ready*

Another underlying theme in the Needs Assessment was “How can a producer readily tell if a school has the capacity and the interest in making local food purchases?” and “How can a producer know if *they* are ready to sell to schools?” NCAT and NFSN will develop tools to help producers assess market opportunity and readiness to support informed decision-making for farm to school involvement and relationship development. These tools, such as decision trees and checklists, would give producers the opportunity to more quickly assess a school system’s current child nutrition program activities and interest in expanding local food procurement (and other farm to school activities) and the capacity of their farm operation/business to enter into or expand participation in school markets. Once a producer has assessed both their own and a school’s readiness for farm to school participation, the curriculum will guide them to develop a farm to school action plan. Action planning, designed to identify strategies for achieving a desired goal, will be the culmination of the farm to school producer training. The action plans are individualized and each producer will have the opportunity to identify and define their farm to school goals, action steps, timeline, and any technical assistance needed.

### *Pilot Training Program with Farm to School Stakeholders*



As a result of early feedback from project partners, the implementation timeline has been modified to include a pilot training for the train-the-trainer program. The goals for this pilot are to provide project stakeholders an opportunity to provide feedback on the training program tools and methodology, establish regional training team leaders and engage state agency partners, and to identify region-specific implementation considerations and technical assistance needs.

In addition, project partners recommend piloting the producer training program content with producer audiences, through the project's Advisory Council structure. Piloting the training with producers would provide a critical opportunity to modify the training approach and "test" training activities before a nationwide rollout of the program. In addition, having the Advisory Council review the curriculum content, delivery approach and content sequence based on their experience and expertise working with producers will increase the efficacy of the training program by making the content approachable and actionable.

#### *Center Producer Experience and Expertise*

Testing the curriculum with the producer support organization representatives on the Advisory Council will provide salient feedback on its efficacy and appropriateness. The Advisory Council has been actively engaged in providing tools and resources to support curriculum development, and their feedback is prioritized in curriculum review processes. During the implementation phase, project partners will partner with Advisory Council representatives to co-host training events, identify farmer mentors and trainees, and provide technical assistance.

#### *Leverage Key Project Partner Expertise*

In addition to the Needs Assessment, the producer curriculum content and the regional train-the-trainer program approach were informed by project partner expertise. FNS brings extensive expertise through their work helping child nutrition program operators incorporate local foods in the National School Lunch Program and its associated programs, as well as the Summer Food Service Program and Child and Adult Care Food Program. NCAT and NFSN provide leadership and bring unique assets to this project through extensive experience working with producers and farm to school market stakeholders, specialized skill sets and technical knowledge expertise, and relationships with farm to school practitioners and partners through robust national networks.

#### **Conclusion**

The publication "Farm to School Producer Training Needs: A Review" from NYU detailed the existing body of research related to producer needs and input from key stakeholders, including producers and producer support organizations from across the country. This Outcomes Report synthesizes the details from the publication into the top producer needs and barriers that need to be addressed in the curriculum to help increase producer access to school markets. NCAT and NFSN have carefully reviewed input and feedback from many sources to craft a curriculum that will engage producers, provide motivation, and increase their capacity to access school markets.



The key barriers and challenges that emerged from partner input and the Needs Assessment have been addressed in multiple areas of the curriculum through applied activities, classroom-based learning, and online content. Recommendations that emerged for approaches to training have been incorporated into the Trainer’s Toolkit and approaches to regional customization through technical assistance. Further, the project team has made additional recommendations for better integrating these recommendations into the curriculum and training program approaches. The project partners believe that the careful assessment of existing knowledge, inclusion of stakeholder input, and multi-level feedback approach, will result in a high-quality comprehensive producer training curriculum and effective train-the-trainer program, increasing producer capacity and support and allowing more producers to access school markets and grow the farm to school movement.