

Winona County Local Foods Inventory Final Report

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Prepared For:
Local Foods Subcommittee, Winona County Economic Development Authority
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1. Introduction

This report outlines the goals, methods, results, and conclusions of a project known as the Winona County Local Foods Inventory. The inventory consists of general information about the supply and demand for local foods in Winona County, as well as a directory of local food producers, processors, and potential institutional buyers. It represents a first step toward a greater understanding of the state of local food production and consumption in Winona County, and, ideally, a step toward increased sales of local foods to local institutions.

The inventory was an initiative of the Local Foods Subcommittee of the Winona County Economic Development Authority. The EDA is a branch of county government whose mission is “to build a strong, diversified, and sustainable economy as a means to improve the quality of life of county residents.” Created in 2005, the EDA oversees three active subcommittees: the Local Renewable Energy Subcommittee, the Rural Development Subcommittee, and the Local Foods Subcommittee.

Over the past four years, the Local Foods Subcommittee has organized many events to raise awareness of the importance of “eating local,” including cooking demonstrations, a Harvest Feast, and three Local Food Forums. Building on the success of these events, the group recently decided to begin focusing on projects that would result more tangibly in an increase in the sale and consumption of locally grown and processed foods. The first such project was this Local Foods Inventory, which was commissioned in the fall of 2008.

At the heart of the inventory were about 100 in-depth telephone surveys of local food producers, institutions, and processors. The key findings that emerged from these conversations include the following: First, Winona County and the surrounding region are home to a large number of food producers who raise a great variety of foods. Most of these farmers are interested, and in many cases eager, to sell their products to institutional buyers, but the potential for these sales remains largely untapped—only ten percent of producers surveyed have sold their products to a school, hospital, or nursing home.

Second, due to the high volume of meals they serve, (participants in this survey averaged over 500 meals per day), institutions are potentially a very large market for local foods. Although very few institutions are currently serving significant amounts of local foods, most said they would be interested in serving them. However, the majority of institutions haven’t pursued local foods because of a number of barriers, including lack of knowledge of where to find local foods; lack of knowledge or sufficient personnel to cook fresh foods; inability or unwillingness to work with multiple vendors; concerns about the quality and consistency of local foods; belief that federal regulations prohibit buying food from local farmers; and, especially in the case of public schools, extremely limited food budgets.

In sum, there seems to be an untapped supply of local foods, as well as an interest in them on the part of institutional buyers. Thus, there is the potential for many more transactions

between local farmers and local institutions, especially if the barriers and concerns expressed by both sides can be addressed.

2. Methods and Procedures

The Local Foods Inventory sought to gather information on the following groups:

- Institutions (schools, hospitals, nursing homes, and restaurants) in Winona County
- Food processors in Winona County
- Food producers in Winona County *and* all adjacent Minnesota counties: Fillmore, Houston, Olmsted, and Wabasha

The project entailed the following steps:

1. Identify food producers, potential institutional buyers, and processors.
2. Develop standardized surveys to be used for data collection.
3. Collect relevant data for each producer, processor, and institution
4. Compile the data into a usable directory format
5. Prepare a report of relevant findings

Identifying Potential Participants

A list of institutions and processors was generated by searching the yellow pages and the internet, and by input from the Local Foods Subcommittee members. The subcommittee helped narrow the field of potential contacts by prioritizing those more likely to be interested in participating. They eliminated from the list 22 chain restaurants with low potential for interest in local foods and 13 large dairy processors known not to sell local products to local institutions.

Local food producers were not as easy to identify as institutions and processors. The list of producers was primarily compiled from the searchable databases and directories of several local, regional, and national organizations, including:

- Minnesota Grown (www.minnesotagrown.org)
- Local Harvest (www.localharvest.org)
- Food Alliance (www.foodalliance.com)
- The National Sustainable Agriculture Information Service (www.attrainternships.ncat.org)
- The Land Stewardship Project_ (www.landstewardshipproject.org/pdf/sfd.pdf)
- The Minnesota Department of Agriculture's Directory of Organic Farms (www.mda.state.mn.us/food/organic/directory.htm)

Several producers were also identified through local farmer's markets.

Development of Survey Questions

Deciding on which information to collect and how to structure the surveys to best capture the information was a process that involved:

- Brainstorming a list of potential questions
- Researching similar surveys that have been conducted by other groups, comparing approaches and incorporating useful elements
- Interviewing a nutrition director from a local school to find out what information on producers would be useful
- Meeting with the subcommittee (including several members who are local food producers) to discuss and revise the compiled questions

The goal was to contact every potential participant by January 2009, so that results could be made available in time for growers to plan their plantings for the year. Because of the short timeframe, we decided to conduct the majority of surveys by telephone, and to offer an email survey as an option for participants. About 90% of surveys were completed in phone interviews. Most of the remainder were completed by email. Three surveys were completed by hand by Amish growers.

Summary of Participation

Producers

Producers identified: 126
Producers who completed survey:
67
Producers who declined to take
survey: 10
Producers not reached: 49

Processors

Processors identified: 10
Processors interviewed: 9
Processors not reached: 1

Institutions

Total Number of Institutions
Identified: 37

Restaurants: 16
Nursing homes: 11
Schools and colleges: 9
Hospitals: 1

Institutional Buyers who
Completed Survey: 19

Restaurants: 8
Schools and colleges: 6
Nursing homes: 4
Hospitals: 1

Institutional Buyers who Declined
to take Survey: 1

Institutions Not Reached: 17

Total

Producers, Institutions, and Processors Identified: 173
Total who Completed Survey/Interview: 95 (55%)
Total who Declined: 11 (6%)
Total Not Reached: 67 (39%)

Opportunities

The problems encountered over the course of this project, as well as its own inherent limitations, suggest some ways similar projects or expansions of this project might maximize their reach and effectiveness. Some things to consider might include:

- Time frame: In this project, data was collected over a period of about two months, which necessitated the use of phone surveys. A longer timeframe could increase participation by allowing for more data-gathering techniques, such as sending surveys by mail and doing other outreach.
- Time of year: During the course of this project, many potential participants were unreachable because they were out of town for the holidays, or in the case of some farmers, out of town for the winter. Summer farmer's markets would be a good place to contact many farmers at once.
- Diversity of sources of contact information: Most of the food producers contacted for this project were identified because of their involvement in organizations that promote organic or sustainable agriculture. There may be an opportunity to reach more conventional farmers and food producers through the various mainstream producers' associations. Other important groups that are not well represented in this inventory are Amish, Hmong, and Hispanic farmers.

3. Findings

Producer Profile

Out of 126 identified producers, 77 were successfully contacted. Of those 77, ten declined take the survey, for the most part because their operations were too small to sell to institutions (5), or because they turned out not to be food producers (2). (One dairy producer declined to take the survey because he is under contract to sell all his milk to one processor, another had recently quit farming, and one producer declined to be surveyed for unknown reasons).

Of the 67 producers who completed the survey, 32 (48%) said they would be very interested in selling their products to institutional buyers in Winona County; 30 (45%) said they would be interested or somewhat interested, and five (7%) said they would not be interested.

Of the five who said they would not be interested in selling their products to Winona County institutions, the reasons were as follows: two were too small, one was not a food producer, one only markets via a CSA¹ program, and one was a pumpkin patch whose main focus is agro-tourism.

(Three producers cautioned that they don't currently produce a large enough volume of food to sell to institutions, but plan to in the future).

¹ CSA = Community Supported Agriculture, which is a subscription service whereby members pay a yearly fee for the delivery of agricultural products.

The 62 producers who said they would be interested in selling their products to Winona County institutions listed a wide variety of foods as their primary products, including vegetables, herbs, and fruits; milk, butter, cheese, and eggs; honey, maple syrup, wine, and nuts; and nine types of meat and poultry. (See sidebar).

These producers used a number of different terms to describe their businesses and products. Sixteen of the producers (26%) described themselves as having certified organic produce, meat, or land, and two said they're in transition to organic. Twenty-three (37%) described their operations as "sustainable," "organically grown but not certified," "Earth-friendly," or "chemical-free." Producers also described their operations with 22 other terms and certifications, many of which highlight ecological soundness or humaneness. (See sidebar).

Marketing Outlets

One survey question asked producers to name their current marketing outlets. Of the 67 producers interviewed, 37 (55%) use direct marketing (delivering products to customers or having them pick orders up at the farm or meat processor), 28 (42%) sell at one or more farmer's markets, and 27 (40%) sell their products to retail outlets or restaurants. Twelve (18%) sell wholesale, to a cooperative, or at a sales barn, six (9%) have CSAs, five (7%) sell via a website, and two (3%) sell products by mail order. No producers listed schools or hospitals as current marketing outlets.

The majority of producers, 71%, use more than one marketing outlet; of those who use only one, the majority use farmer's markets, direct marketing, and wholesale.

Past Experiences Selling to Institutions

Forty-one producers (61%) had sold to institutional buyers in the past, including twenty-four (36%) who have sold to restaurants, twenty-three (34%) who have sold to retail outlets, seven (10%) who have sold to schools, and four (6%) who have sold to hospitals or nursing homes. The majority of producers who sold to institutions did so directly; only five (12%) had used a distribution system such as the Southeast Minnesota Food Network for some or all of their sales to institutions.

Primary Products:

Vegetables (26) Beef (15)
Eggs (13) Chicken (12)
Lamb (8) Apples (7)
Pork (7) Berries (4)
Honey (4) Milk (4)
Turkey (4) Bison (3)
Elk (3) Cheese (2)
Wine (2) Butter (1)
Boar (1) Dried corn (1)
Goat (1) Maple Syrup (1)
Mushrooms (1) Nuts (1)

Producer Descriptions and Certifications:

Organic (16)
Grass-fed (11)
Free-range (10)
Pasture-raised (8)
Minnesota Grown Association (6)
Hormone and antibiotic-free (4)
Food Alliance (3)
Non-GMO (3)
All-Natural (2)
Cage-free (2)
Grass-finished (2)
Integrated pest management (2)
Transition to organic (2)
Animal Welfare Institute Certified (1)
Beyond organic (1)
Conventional (1)
Green Routes (1)
Level 4 Johnes (1)
Niman Ranch standards (1)
100% reclaimed-food-fed (1)

Of the producers who had sold to institutions in the past, 24 (58%) said the transactions had been primarily good experiences, 4 (10%) said they'd had a mix of good and bad experiences, and one had had primarily bad experiences. Those who'd had problems described the following issues:

- Several producers found they were unable to meet the demand of grocers who needed big orders every day, or whose order sizes fluctuated wildly from week to week. One hog farmer said he has had to educate institutional customers who are used to ordering a day or week in advance, reminding them that “we need orders several weeks in advance.”
- Two producers said they found that local institutions can't offer a price competitive with what they could receive selling directly to consumers or to large distributors in the Twin Cities.
- Two producers found restaurant billing cycles to take too long, or had to follow up with restaurants for payment.
- One producer found that a local retail outlet that sells many local foods had a close-knit culture that was too difficult to break into.
- One producer had trouble finding institutional buyers who were interested in buying local foods.
- One producer had been selling elk jerky to local schools, but was forced to drop the product when her processors stopped offering elk processing and individual packaging.
- One producer who had sold to a local school found that the school seemed to have “shied away from small farmers” over the past several years.

Food Transportation

When asked how they would transport their products to institutions in Winona County, thirty-six producers (58%) said they were able to deliver or were “flexible,” nine (15%) said the buyer must pick the food up at the farm, meat processor, or farmer's market, three said they would use a distribution system such as the Southeast Minnesota Food Network, and two said they'd use a delivery service.

Asked whether they would be interested in a local food distribution cooperative system, 42 producers (68%) said they would. Nine said they would not be interested.

Institution Profile

Out of 37 potential institutional buyers identified, 20 were successfully contacted. Of those, 19 completed the survey, and one, a national chain nursing home, declined, explaining that each member of the chain purchases food through one national distributor, and that all purchases must be approved through the company's headquarters. (Nutrition directors at other branches of the chain confirmed this).

The institutions surveyed included eight restaurants and cafés, six schools and colleges, four nursing homes, and one hospital. The number of meals served per day among the institutions ranged from 40 to 4,300, averaging about 530 (not taking into account the fact that some institutions do not serve meals every day).

The institutions were asked to name their top three considerations when making food purchases. The following table shows each consideration and the number of institutional buyers who named it, broken down by type of institution. For example, the table shows that all six buyers from the six colleges and schools surveyed said price is one of their top three considerations. (Note: not every buyer listed three considerations).

Top Three Considerations	Colleges, Schools (out of 6)	Restaurants, Cafés (out of 8)	Nursing Homes, Hospitals (out of 5)	Total (out of 19)
Price/Affordability	6	5	5	16
Quality	2	4	5	11
Nutrition	5		1	6
Sufficient Quantity Consistently Available		2	3	5
Freshness		2	1	3
Locally-grown or produced	1	2		3
Long-storing		1	1	2
Meets Contractual Obligations to Vendor and/or Client	1			1
USDA Certified	1			1
Acceptable to kids	1			1
Low Fat Content	1			1
Vendor Provides Good Service			1	1
Organic		1		1
Item is on Sale		1		1

Previous Experience Serving Local Foods

Twelve of the 19 institutional buyers (including four of the schools, six of the restaurants, and three of the nursing homes) had purchased and served local foods in the past (or continue to serve them currently). The buyers described the means by which they had become familiar with the local products they have served, including the following:

- Five buyers had learned of local products via their distributors or meat processor (Ziebell’s, Winona Fruit, and Ledebuhr Meat were cited).
- Three buyers had become familiar with the products at grocery stores or the farmer’s market.

- Three buyers had purchased specific local foods after being encouraged by customers (or in the case of an elementary school, by the parents of a student), or through another personal connection.
- Three buyers had intentionally cultivated relationships with individual farmers.
- One buyer had purchased a local food product after being introduced to it by a county extension agent.

Of the twelve institutional buyers who had purchased local foods in the past, nine said the transactions had primarily been good experiences, one said the experience(s) were mixed, and one said the experience(s) had been primarily bad. Those who experienced challenges or problems described the following issues:

- Four buyers said they have had a hard time working local produce into their menus because of its seasonality, or because items weren't consistently available. One of the four also hesitated to buy local foods because she wanted to maintain a good relationship with her main vendor. "It makes them upset if I drop out of my normal buying habits to buy local for the summer," she explained.
- Two buyers had difficulty coordinating the delivery of produce from local farmers.
- One restaurant buyer had trouble finding a source for local meat and cheese. She noted, "our demand is sometimes greater than what's available."

Present and Future Interest in Local Foods

The institutional buyers were asked to rate their level of interest in purchasing local foods. The following table shows the buyers' level of interest, by type of institution.

Interest Level	Colleges, Schools (6 total)	Restaurants, Cafés (8 total)	Nursing Homes, Hospitals (5 total)	Total (out of 19)
Very Interested	3	2	2	7
Somewhat Interested	3	3	1	7
Not Interested		2	3	5

As the table shows, five of the 19 institutional buyers surveyed said they were not interested in purchasing local foods. They listed the following reasons why:

- Two buyers for nursing homes said internal regulations prevented them from buying from local farmers.
- Another buyer for a nursing home thought local foods would not be available in a small town.
- One restaurant buyer said he values the fact that the food he purchases through his current vendors is guaranteed, and so wouldn't want to risk purchasing local foods.

The 14 institutional buyers who identified themselves as being either somewhat interested or very interested in purchasing local foods were asked to name the reasons they would like to serve local foods. The interviewer suggested that reasons might include quality, taste, nutrition, environmental considerations, to support local farmers, economic development, or consumer demand. Four buyers responded that they were interested in local foods for all of the suggested reasons. Six buyers emphasized that their primary interest was in “helping out the local economy,” “supporting this community,” or “keeping money here,” while four buyers emphasized their desire to support local farmers. Four buyers said that they were interested in serving local foods because of the products’ superior freshness and nutrition, and one cited the convenience of local foods. One buyer listed environmental considerations as a reason for purchasing local foods. And one chef expressed his concern that foods from unknown sources are potentially dangerous due to chemicals and antibiotics.

The buyers were asked which types of local foods they would like to serve, and/or which types they could see themselves incorporating into their menus. The largest number of respondents (eight, including four restaurants, two schools, a nursing home, and a hospital), said they’d be interested in any type of food (the buyers for both schools said they would be most interested in fruits and vegetables). Most of the other institutional buyers emphasized that local produce would be easiest for them to serve, but two schools also expressed interest in meat and eggs, and one school was most interested in finding a local source for cheese and milk.

When asked whether they need fruit and vegetables to be pre-processed (peeled, portioned, or diced), the majority of buyers said no. However, buyers for the hospital and two of the schools said most forms of pre-processing would be very helpful.

Current and Potential Purchasing Channels

The institutional buyers who expressed an interest in serving local foods currently purchase foods via local farmers (3), the Southeast Minnesota Food Network (a cooperative local food distributor (1)), and a variety of food distributors, including:

- Sysco (4)
- Ziebell’s (4)
- Hawkeye (3)
- Reinhart Foods (3)
- Bix Produce (2)
- Winona Fruit (2)
- Bakalars (1)
- Co-op Partners (1)
- Jollivet (1)
- Kemps Dairy (1)
- Midtown Foods (1)
- Northstar Foods (1)
- Rochester Wholesale (1)
- Roots and Fruits (1)

- Roxy's (1)
- US Foods (1)

The buyers were asked whether any of their distributors carry local foods. Five said they didn't know (including two who had asked their distributors but were told the distributors themselves didn't know), one said no, and four said their distributors do carry local foods. Three of the buyers said they had purchased local foods through a distribution company. The companies they listed as sources of local foods were Bix Produce, Winona Fruit, and Sysco.

Asked whether they'd like to purchase local foods directly from producers, through a local cooperative distribution system, or through their current vendors, the buyers who were most interested in serving local foods tended to say they could be flexible (three schools, one restaurant), while those who were less interested in serving local foods tended to say they would have to be purchased through their current vendors or distributors (two schools, one nursing home, and one restaurant). (One of the restaurant buyers said she was concerned about whether regulations and inspections would be involved in purchases from individual farmers). Four buyers, mostly representing large institutions, said a producer cooperative might work for them (three schools, one restaurant). One restaurant buyer said she liked the idea of a cooperative, but one she had tried hadn't met her needs. Two buyers weren't sure which channels would work best for them (the hospital and one restaurant), while one restaurant buyer expressed a preference for purchasing directly from producers.

Eight institutional buyers said they would prefer a non-obligatory, fresh-list type of arrangement with local food producers, while buyers for two schools said they would be open to different types of arrangements. One restaurant buyer said she'd like to have pre-season discussions with farmers about types and quantities of products to help the producer prepare for the season, but said she wouldn't favor pre-season contracts, since, "it's tough for farmers to predict what will happen." Another restaurant buyer said he prefers CSA arrangements, which allow him access to "whatever's looking best that week."

Buyers for eight institutions said they require vendors to carry product liability insurance, while two restaurants said they weren't sure, and one restaurant and one school said they do not.

When asked whether they would require local foods to be delivered, or whether they would be able to pick the products up at a drop-off point such as a meat processor or farmer's market, ten buyers said they would be "somewhat flexible" (three of these specified they were somewhat flexible, but would prefer delivery.) One buyer, representing a hospital, said food must be delivered. Most buyers said delivery days and times were somewhat flexible, but several restaurants and cafes specified they were unable to accept deliveries during the lunch rush.

Seven buyers said they would be interested in educational opportunities offered by producers, such as farm tours or presentations at the institution. Six buyers, representing three schools, a hospital, a nursing home, and a hospital, said they would not be interested.

Processor Profile

Of the ten processors identified, nine were successfully contacted and interviewed about the services they provide, and, where applicable, about the potential role they could play in connecting local institutions to sources of local foods.

The processors identified included six meat processors, one poultry processor, one processor of frozen fruits and vegetables, one grain mill, and one national dairy cooperative that sells local milk.

Working with Processors

Among meat processors, the most significant point in terms of local food sales to institutions is the issue of USDA inspection, which is required for meat sold to institutions. Only two of the meat processors surveyed offer USDA inspection, one regularly (Ledebuhr Meat in Winona) and one occasionally (Huettl's Locker and Dressing Plant in Lake City). The owner of Ledebuhr Meat expressed strong interest in processing orders for institutions, although his business is operating nearly at capacity.

It is also important to note that processors don't sell the meat they process; institutions would actually buy the meat directly from producers. Although all the meat processors interviewed also sell meat at a retail counter, none of them are currently a potential market for local meat producers, because none sell local meat.

At the time of this project, the poultry processor, Burt's, had recently been sold to new owners after having been closed for two months. The scheduled re-opening was to be mid-February.

The remaining processors contacted (Sno-Pac Foods of Caledonia, Great River Organic Milling of Winona, and Organic Valley, a cooperative with an office in LaFarge, Wisconsin) are all potential buyers for local growers, and potential sources for institutions.

4. Description of Directory

One of the goals of the Winona County Local Foods Inventory was to create a directory of local food producers, potential institutional buyers, and processors, to be used as a tool for producers to find potential markets for their products, and for institutional buyers to find sources of local foods. The directory may also be used by consumers.

Available as a paper document or an Excel spreadsheet, the directory displays detailed information on each producer, institution, and processor, including types of food available (producers), types of food desired (institutions), and services offered

(processors), food transportation options, package sizes, and distributors and distribution cooperatives used.

5. Conclusion

Winona County and the surrounding region are home to a diverse local foods infrastructure, with a wide variety of foods being produced, three farmer's markets, at least one local marketing cooperative, many different food processors (although perhaps a limited capacity for USDA-inspected meat and poultry processing), and several institutional buyers committed to serving local foods.

There is also significant potential for increased sales of local foods to institutions in Winona County, evidenced by the fact that 14 of 19 institutions surveyed expressed interest in purchasing local foods, and 93% of the 67 producers surveyed expressed interest in selling to institutions.

One goal of this inventory was to discover some of the barriers preventing sales of local foods to local institutions. The challenges that producers and institutional buyers described are presented in Part 3 of this report—some significant ones included:

- The disparity between the price some institutions are able to pay for local foods and the price producers need to make a profit.
- The fact that some large institutions need vegetables to be pre-processed (and producers have to have access to a commercial kitchen in order to sell processed foods).
- The fact that many meat producers are only able to sell whole or half animals at a time, while many institutions need to purchase retail cuts.
- The fact that many institutions would find it more convenient if they could purchase local foods through their current distributors, while few distributors carry local foods.
- The perception of some institutional buyers that federal regulations prohibit or complicate the purchase of local foods.

However, the challenges cited by the greatest number of producers and institutions all had to do with the limited availability or consistency of local foods. For example several growers said they couldn't accommodate big week-to-week fluctuations in the size of institutions' orders (fluctuations that might have seemed small to the institutions doing the ordering), and several buyers said they had a hard time using local produce because farmers might not have enough of a certain item, or if the buyer ordered the same product, its quality might vary from week to week.

This is an important point, because in some ways, limited availability and consistency are inherent to local foods, due to the fact that there is a limited growing season, individual fruits and vegetables each have their own windows of ripeness, quality and harvest time of crops depend on uncontrollable conditions, and since farmers who market locally tend to grow on a small scale. These are the core challenges that will need to be worked around in order for many institutions to be able to serve local foods.

Several ways to deal with these challenges were suggested by producers who were surveyed for the inventory:

- One hog farmer requires customers, including institutions, to place their orders several weeks in advance.
- A small-scale chicken farmer suggested that, while he would not be able to supply chickens to institutions year-round, he could make an arrangement with an institution to raise a single large order of chickens once a year.
- Several producers interviewed are members of the Southeast Minnesota Food Network, a marketing collaborative in which products are pooled and distributed together.

There were three institutions interviewed who currently serve a high proportion of local foods: Signatures Restaurant and The Blue Heron Coffeehouse, and Riverway Learning Community, a charter school in Minnesota City. There were several practices that these institutions had in common that allowed them to serve local foods:

- The buyers had cultivated trusting relationships with a network of local producers.
- They tended to be flexible in terms of working with multiple vendors, utilizing several different types of contracts with producers, being willing to pick up some orders, and changing their menus to utilize available ingredients.
- Each of the three primarily cooks from scratch, in some cases doing their own baking and butchering their own meat.

Some of these practices would be very difficult for a large institution. However, the Winona Area Public Schools provide an example of a large institution (serving 3500 meals per day) that has served some local foods, and is pursuing further strategies to incorporate them, including writing grants. Nutrition director Lyn Halvorson has also come up with a list of local foods that would meet her requirements of being and acceptable to kids and easy to prepare and serve, including watermelon and bison hot dogs.

Recommendations

It is hoped that this inventory will be useful to local food producers and institutions, as well as to other organizations and individuals who share the goal of increasing the availability of local foods in the community. In order to be most useful, the directory should ideally be maintained over time so that new producers, institutions, and processors can be included. To be most accessible, it should be made available online. Another feature that could increase the usefulness of the directory would be to use software such as GoogleMaps to create an interactive map of the participating producers, institutions, and processors (such a map could also be tied to a statewide map of local foods resources currently being created by Annalisa Hultberg for the University of Minnesota's Regional Sustainable Development Partnerships).

6. Appendix 1: Producer Survey

**Local Foods Inventory
Local Foods Subcommittee
Winona County Economic Development Authority
January 2009**

Questions for Growers/Producers

Instructions: Please answer the questions that apply to you by choosing from among the bracketed selections and typing your answers in the space provided

If you have any questions, or if you prefer to take the survey over the phone (it takes about five minutes), please email Sara or give her a call at 507-252-9639. Questions may also be directed to Linda Grover, the director of the Winona County Economic Development Authority, at 507-457-6483.

1. Please confirm your contact information:

Name of business:
Address:
County:
Contact Person:
Phone Number:
Email:
Website:

2. What are your primary products?

[Vegetables/Fruits, Milk, Cheese, Beef, Chicken, Pork, Elk, Herbs/Flowers, Dairy, Honey, Nuts, Baked goods, Other (please specify)]

3. How do you describe your business or products? Please choose all that apply:

[Organic, Small Farm Organic, in transition to organic, grass-fed, Minnesota Grown, Food Alliance, local fair trade, humane, biodynamic, kosher, halal, free-range, Cage-Free, pasture-raised, family farmed, heritage breeds, other (please specify)]

4. Which of the following marketing outlets do you currently use?

[Farmer's market, CSA, farm stand or on-site sales to consumers, direct to retailers or restaurants, food or produce distributor, marketing cooperative, web-marketing, mail order, other (please specify)]

5. Have you sold to any institutional buyers (such as hospitals, schools, nursing homes, or restaurants)?

[Yes, no] (If no, please skip to question 6)

5a. If so, which type of institution(s)?

[hospital, school, nursing home, restaurant, other (please specify)]

5b. Did you sell your product directly to the institution, or through a distributor or cooperative? Please choose all that apply

[directly, distributor/cooperative, other arrangement (please specify)]

5c. Have your experiences selling to institutions been good experiences?

[Yes, no, I've had some good and some bad experiences]

5d. If you've had a bad experience, may we ask what was the reason?

6. Would you be interested in selling to institutional buyers in Winona County? Please rate your level of interest:

[Not at all interested, somewhat interested, very interested]

6a. If not interested, may we ask why not? Please choose all that apply:

[satisfied with current marketing outlets, satisfied with current size of operation, concerned about getting a fair price from institutions, concerned about transportation, other (please specify)]

If you are not interested in selling to institutional buyers in Winona County, thank you for your participation. If you are interested, please continue.

Part Two: for producers interested in selling to Winona County institutions

7. What months of the year do you generally have product available?

8. Are there any crops or products that you specialize in producing on a large scale? (Please specify)

9. Are there any products or crops that you would be particularly interested in marketing to Winona County institutions? (please specify)

10. How would you transport your products to the institution?

[Own vehicle, buyer must pick up, food distribution company, other (please specify)]

11. If you currently work with a food distribution company or cooperative, may I ask which one(s)?

11a. If you don't currently work with a distributor, would you be interested working with some type of distribution system? [yes/no]

12. If you are fruit/vegetable producer, do you offer any of the following forms of food processing?

[Washing, cutting, pre-cooking, other (specify)]

12a. If not, are there any forms of food processing you would consider offering in the future, if requested? (Please specify which forms)

13. If you are a meat/poultry producer, which of the following types of processing do you offer? Please choose all that apply.

[whole animals, halves, quarters, cuts, fresh, frozen, further-processed]

14. If you are a dairy producer, which types of dairy products do you sell?

[Milk, cheese, yogurt, other (specify)]

14a. What volume containers do you sell these in?

15. Would you be willing to offer any of the following educational services to institutions?

[Presentation at the institution, farm tour, cooking demonstration, samples, other (please specify)]

16. May we share the information you have provided to institutional buyers, so that they may contact you if they are interested in buying your products? [yes, no]

7. Appendix 2: Institutional Buyer Survey

Local Foods Inventory
Local Foods Subcommittee
Winona County Economic Development Authority
January 2009

Questions for Institutional Buyers

Instructions: Please answer all the questions that apply to you by choosing from among the bracketed selections and typing your answers in the space provided. Please skip any questions you are not comfortable answering.

If you have any questions, please contact Sara Nelson, the consultant for this project, at 507-252-9639, or Linda Grover, the director of the Winona County Economic Development Authority, at 507-457-6483.

Email completed survey to Sara Nelson at: saracelia@gmail.com

Part One: For all institutions and businesses

1. Contact information

Name of business:
Contact person:
Title:
Phone number:
Email:
Website:

2. About how many meals do you serve per day?

3. What are your top three considerations when making food purchases?

[Product's taste; Product's quality; Product is nutritious and healthy; Affordable price;
Meets contractual obligations with food distributor;
Product is easy to order; Consistent availability; Ease of preparation;
Product is locally grown or processed; Product has a variety of menu applications;
Certified Organic or other eco-label (Please list: _____);
Other (please specify):]

4. Have you ever purchased and served locally produced foods?

[Yes
No] (if no, please skip to question 6)

4a. If so, how did you become familiar with the product(s)? Please list all that apply.

[Through a retail outlet
Farmer's market
Personal connection
Producer approached me
Through a food distribution company or cooperative
Through the internet

Other (please specify)]

4b. How would you describe your experience buying local foods?

[Easy to order and incorporate product into the menu
Somewhat problematic
Very difficult]

4c. If purchasing local foods has been problematic for you, what type of problems have you experienced? Please describe.

5. How interested are you in buying and serving (or continuing to buy and serve) locally-produced foods?

[Not interested
Somewhat interested
Very interested]

5a. If not interested, what are the primary reasons?

[Unable to spend time sourcing local foods
Local foods are too expensive at this time
Unable to do the processing or scratch cooking necessary
Other (please describe)]

If you are not interested in serving local foods, thank you for your participation. If you are interested, please continue.

Part Two: For buyers interested in serving locally-produced foods

6. Why are you interested in serving locally-produced foods? Please list all that apply.

[Quality/taste
Nutrition
Environmental considerations
To support local farmers
Economic development
Consumer demand
Other (please list)]

7. Which types of locally-produced foods are you interested in serving? Please list all that apply.

[Meat
Poultry
Vegetables
Fruits
Dairy products
Eggs
Other (please list)]

7a. If you'd like to serve local vegetables or fruits, do you require any types of pre-processing? Please list all that apply.

[Washed
Cut
Portioned]

Pre-cooked
Other (please specify)]

7b. If meat or poultry?

[Fresh
Frozen]
Able to handle whole, half, or quarter animals? [Yes No]

7c. If dairy?

Types of product (please list):
Packaging/portion requirements? (please describe)

8. Are there any specific foods you would particularly like to find a local source for?

Please list:

9. What are your current purchasing channels? Please circle all that apply.

[Regional distributor (may we ask which one(s)? _____)
Farmer's market
Retail outlet
Direct from producers
Producer co-operative or non-profit (such as Southeast Minnesota Food Network) (may we ask which one(s)? _____)
Other (specify)]

If you do not currently purchase food through a distributor, please skip to question 11.

10. If you currently purchase through a distributor, are you contractually obligated to buy a percentage of food or produce through them?

[Yes (may we ask what percent? _____)
No]

10a. Does your distributor offer locally-produced products?

[Yes
No
Don't know]

10b. If your distributor does offer local foods, have you purchased any through them?

[Yes (please describe which type _____)
No]

10c. Are you interested in sourcing local foods directly from producers (or a producer cooperative), or do you need to purchase them through your distributor?

Definitely interested and able to purchase directly from producers/cooperative
Possibly interested in purchasing directly from producers/cooperative
Logistical considerations or contracts prevent me from purchasing directly from producers at this time; I would need to purchase local foods through a distributor
Other scenario (please describe)

If you are not interested in purchasing foods directly from a local producer or cooperative, please skip to question 16.

11. How interested are you in purchasing local foods directly from farmers/producers?

Not at all
Somewhat
Very interested

12. How interested are you in purchasing local foods from a producer cooperative or non-profit?

[Not at all
Somewhat
Very interested]

13. If you are interested in purchasing directly from local producers or cooperatives, which type of purchasing arrangement would you favor? Please list all that apply.

[Pre-season contract
Non-obligatory weekly fresh-list
Other (specify)]

14. Do you require that vendors be insured?

[No
Yes (Please describe required insurance policy):]

15. What are your delivery needs?

[Product must be delivered at specific times (please describe)

Product must be delivered, but timing is flexible

Able to pick up order from drop-off point (such as farmer's market or meat locker)

Able to pick up order from farm (please specify furthest distance willing to travel _____)]

16. Would you be interested in educational services such as a farmer/producer presentation or a farm tour?

[Yes
No]

17. Would you be interested in any of the following local food tools?

[Menu ideas and recipes
Assistance identifying appropriate sources of local food
Info on USDA purchasing regulations related to local food
Other (please describe):]

18. Thank you for taking the time to complete this survey. The compiled results of the survey will be available online by February, 2009, and we'll be sure to send you the website when it is up and running. We are also putting together a directory of food producers who are interested in selling food to Winona County institutions, which will be made available on the website.

We'd also like to share a similar directory of institutions who are interested in buying local foods with the local food producers. Would you be willing to share any of the information you have provided thus far in the directory? (please indicate yes or no for each item)

Name, address, and phone number	yes	no
Email address	yes	no
Number of meals served	yes	no
Types of local foods interested in	yes	no
Processing requirements listed in question 8	yes	no
Specific local foods listed in question 9	yes	no
Names of distributors you work with	yes	no
Preferred sources of local food	yes	no
Preferred contract type	yes	no
Required insurance policy	yes	no
Delivery needs	yes	no
Interest in educational services	yes	no

20. Any other comments or questions?

Thank you for completing this survey. Please return by email to saracelia@gmail.com.