Needs Assessment Survey & Listening Sessions Results

Betsy Bihn and Laura Pineda-Bermudez
National GAP Program, Cornell University
NECAFS February 12, 2020
Background

• LFSC wanted to consider needs of “local” growers and processors
  • Define what it means to be local
    • Over 50% of food sold with 275 miles
  • Knew from the beginning we would do both a survey and listening sessions
    • Clarify things from the survey through the listening sessions
  • Focused on national scope and having representation in all the FDA regions
    • Survey has good national distribution
    • Diversity of responses in listening sessions cannot be completely attributed to region
Density of Survey Responses Nationwide (n=1273) (Northeast, n = 207)

... with 8 participants in the Northeastern Grower Listening Session and 9 in the Processor Listening Session
### USDA Identifiers

| Identifier(s)                              | n   | %  *
|--------------------------------------------|-----|-----
| Woman Farmer                               | 307 | 24%
| New and Beginning                          | 280 | 22%
| Limited Resource                           | 206 | 16%
| Registered with a Farm and Track #         | 160 | 13%
| USDA Organic                               | 111 |  9%
| NRCS (Natural Resources Conservation Services) Cooperator | 94  |  7%
| Socially Disadvantaged                     |  65 |  5%
| None of these                              |  46 |  4%
| Plain Sect Farmer                          |  15 |  1%

*percent of total participants
Total Survey Participants: National vs Northeast

<table>
<thead>
<tr>
<th>Identifier(s)</th>
<th>National</th>
<th></th>
<th></th>
<th>Northeast</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>%</td>
<td></td>
<td>n</td>
<td>%</td>
<td></td>
</tr>
<tr>
<td>Farmer Only</td>
<td>615</td>
<td>48%</td>
<td></td>
<td>78</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>Farmer &amp; Processor</td>
<td>94</td>
<td>7%</td>
<td></td>
<td>18</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Farmer &amp; Packer/Aggregator</td>
<td>205</td>
<td>16%</td>
<td></td>
<td>45</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Farmer &amp; Processor &amp; Packer/Aggregator</td>
<td>222</td>
<td>17%</td>
<td></td>
<td>40</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Packer/Aggregator Only</td>
<td>56</td>
<td>4%</td>
<td></td>
<td>6</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Packer/Aggregator &amp; Processor</td>
<td>26</td>
<td>2%</td>
<td></td>
<td>10</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Processor Only</td>
<td>55</td>
<td>4%</td>
<td></td>
<td>10</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1273</strong></td>
<td><strong>100%</strong></td>
<td></td>
<td><strong>207</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Local Food Producer
### Gross Annual Sales

<table>
<thead>
<tr>
<th>Gross Annual Sales</th>
<th>National</th>
<th></th>
<th>Northeast</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(n)</td>
<td>%</td>
<td>(n)</td>
<td>%</td>
<td></td>
</tr>
<tr>
<td>$0-$24,999</td>
<td>304</td>
<td>51%</td>
<td>82</td>
<td>45%</td>
</tr>
<tr>
<td>$25,000-$250,000</td>
<td>185</td>
<td>31%</td>
<td>64</td>
<td>35%</td>
</tr>
<tr>
<td>$250,001- $499,999</td>
<td>24</td>
<td>4%</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>$500,000-$1,000,000</td>
<td>24</td>
<td>4%</td>
<td>9</td>
<td>5%</td>
</tr>
<tr>
<td>Over $1,000,000</td>
<td>24</td>
<td>4%</td>
<td>14</td>
<td>8%</td>
</tr>
<tr>
<td>I prefer not to say*</td>
<td>N/A</td>
<td>N/A</td>
<td>5</td>
<td>3%</td>
</tr>
<tr>
<td>Unknown</td>
<td>18</td>
<td>3%</td>
<td>3</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>597</strong></td>
<td><strong>100%</strong></td>
<td><strong>183</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

* "I prefer not to say" answers not included in n for National producers
Every Market Supplied by Local Food Producers

Northeast Growers:
Percentage of Market Sales

** In survey, USDA foods-commodity program was not supplied BUT family & friends was added as an ‘other’ category

*in LS, wholesale & export not supplied
Worker Training Question

- Survey results “N/A”
  - Food safety trainings are provided for all workers
- Listening session clarifications
  - Informal, not written down
  - Small operations, 1 or 2 workers (owners)
  - Non-traditional work forces (family, volunteers, church)
    - Not considered workers
    - Running risk of insulting non-traditional workers
- Often not considered a food safety concept by farmers

Opportunity for educational materials for non-traditional workforces
Northeast Listening Sessions

• Diversity of operations make it difficult for growers to find assistance/ templates/ resources
  – Lack of consistent answers cited frequently

• Technical assistance requested and specified as a need
  – Specific names of people who were helpful
    • Extension associates, government personnel, organic inspectors
    • Years of experience, high level of competency, not easily replaced
Northeast Listening Sessions

• Grant writing assistance
• Very small farms, diverse operations
  – Unusual conditions (contract growers, rooftop farms)
  – Commodities (mushrooms)
• Crossroads of local, state, buyer, federal requirements
• Not being able to expand operation due to lack of technical assistance
  – Afraid to build or grow due to lack of consistency in interpretation of the rule

In some cases, resources requested don’t exist..
Some requested resources already exist, people just don’t know where to look
Notable Quotes from Northeast Producers

“I’m finding myself at that fringe of a lot of different subjects. There is a lot of ambiguity in the food safety standards.” -G

“You have to make time for this thing that you never had to make time for before.” -G

“it's like a part-time job to work with Whole Foods, I dunno if it's worth it.” -P

“And the State ones, you have the same inspectors for three years and then they go on vacation and a different inspector comes and they want you to rip the place down and then build it up from start so it meets their–” - P

“To me it's like the government is funded to create all these regulations, why aren't they also funding, helping us follow the regulations.” - P

“And yet the Food Safety Modernization Act has halted us from a planned expansion because it's been very difficult for us to get clear and definitive information about which local regulation we fall under...” -P
Key barriers in Northeast Listening Session

**Communication** of appropriate, timely, clear information
- Inconsistency between state, federal, commercial requirements
- Confusing websites

**Buyer pressures or requirements**
- One step ahead of where industry is
- Harmonized GAP doesn’t go to where they are, lost business

**Time**
- Hard to find the time to DO things even if people are offering help

**Paperwork**
- Overwhelming volume
- Confusing & inconsistent requirements

**Labor**
- Language barriers
- Worker-training
Key barriers in Northeast Listening Session

**Cost**
- Infrastructure:
  - Bathrooms
  - Hand-washing stations
Grant structure inconsistent, not enough funding available
  - Discouraged from writing grants
  - Competition
  - More funding sources for growers than for processors

**Understanding regulation**
Ambiguity in interpretation of regulation
Unaware of a requirement until it’s a problem during audit or inspection
- Applying regulation to operation

**Culture**
- Changing the culture of farming
- Changing your mindset
Things to Ponder

• Some producers more “FSMA-ready” depending on organic certification, state of residence, buyer demand

• **Need to technical assistance is clear** – but that technical assistance needs to be competent in order to be helpful

• Inconsistent information/lack of information is a big problem
  – Unreasonable disruptions to farmers and processors
  – Creates lack of trust
  – Makes food safety seem like witchcraft as opposed to science
  – Stops people from expanding their operations

• Much work left to do
Questions and Discussion