2024

FARM TO SCHOOL:

SUPPLY CHAIN ANALYSIS OF PRODUCERS

An Analysis of Producer Willingness and Readiness to Supply Local Agricultural Products to School Food Authorities

THE REPORT

This report aims to provide valuable insights for School Food Authorities (SFAs), policymakers, and agricultural producers, offering a comprehensive evaluation of current perspectives and readiness levels among producers in relation to Farm to School initiatives.

AUTHORS & COLLABORATORS

This report has been developed by Lizzy Cooper of CCE Harvest New York, Jonnell Robinson of Syracuse Grows, Lindsey Promitas of CCE Jefferson, Micah Orieta and Alex Warhal of the Syracuse-Onondaga Food Systems Alliance, and Sarah Rosenthal of CCE Madison. Our work has been greatly enhanced through collaboration with Cornell Cooperative Extension Harvest New York, Cornell Cooperative Extension of Jefferson County, Cornell Cooperative Extension of Madison County, Cornell Cooperative Extension of Cortland County, Syracuse City School District, Syracuse-Onondaga Food Systems Alliance (SOFSA), and Syracuse University.

Photographs and design by Micah Orieta.

ACKNOWLEDGMENTS

We extend our thanks to the dedicated partners whose staff committed their time and resources to this project. We also appreciate the participation of the 142 agricultural producers who shared their insights and experiences regarding Farm to School (F2S) initiatives within their communities. Their contributions have been invaluable in shaping the findings and recommendations presented in this report.

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BACKGROUND

The region of focus for this study includes Cayuga, Cortland, Jefferson, Lewis, Madison, Oneida, Onondaga, and Oswego Counties. These counties were chosen based on knowledge of regional production, distribution, and consumption, as well as the school food purchasing sheds, namely through five overlapping BOCES that serve the proposed region and Syracuse City School District (SCSD), which is the largest school district in the region. This foodshed, rich with agricultural producers, is home to 75 school districts and over 173,257 students. About 99,700 students are served through the Child Nutrition programs in this region.

The region has 5,024 farms that make up 1.3 million acres of farmland, with an average farm size of 233 acres. The total market value of products sold annually in these counties is $1.7 billion (USDA-NASS, 2022).

RATIONALE

The **rationale** for conducting the survey was two-fold:

- F2S awareness and participation among regional food producers is relatively low. We were interested to know more about what food producers know about F2S, how many of them have participated in F2S, learn about their experiences, and identify food producers who would like to learn more and explore participating.

- Regional schools/districts are interested in purchasing farm fresh food from local producers, but often don't know how to find interested producers or what products are most readily available.

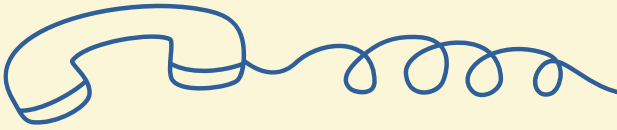
The **goals** of the survey were to do the following for the CNY region and adjacent areas:

- Establish a baseline of producer participation in F2S
- Assess producer interest in participating in F2S
- Identify barriers to participation in F2S
- Create opportunities to match interested producers with interested schools/school districts.

DESIGNING AND CONDUCTING A FARM TO SCHOOL INTEREST SURVEY FOR CENTRAL NEW YORK PRODUCERS

The original survey was created with input from the Syracuse City School District (SCSD) food service director. In its original format, the survey asked some questions that were specific to SCSD such as whether producers could produce the products and quantities that SCSD needed, whether they could transport products directly to the SCSD, etc. Survey design was also informed by existing gray and scholarly literature on opportunities and barriers to implementing Farm to School in the U.S. and in New York State (Christensen & Stephens, 2018; Schmidt, 2021; Weissman & Potteiger, 2021). The original survey was piloted with a local producer (Angela Nelson, owner of Old Fly Farm) who provided extensive feedback and suggested edits to questions. Updates and improvements to the survey were made during the first round of surveying based on early conversations with producers.

The survey was created using Qualtrics and consisted of closed- and open-ended questions. The survey was meant to be conducted via telephone or in person when CCE staff had the opportunity to interact with producers. Ultimately, most surveys were conducted by phone. Surveys took approximately 15 to 30 minutes to complete.



DEVELOPING A PRODUCER DATABASE

A database of 360 producers in 23 counties was compiled using a variety of publicly available directories such as GAP certification, NY Grown and Certified program participants, and producer contacts that the project partners already had.

Due to time constraints and the focus on Central NY producers, surveys were completed in 12 of the 23 initial counties. These counties included the eight counties identified as the Central NY region of focus and four other counties. Additionally, some farms were removed from the database because they were no longer in operation. After focusing on the producers with closer proximity to Central NY school districts, outreach by project partners focused on 287 farms. For the purposes of this report, we will use the term Central NY as a reflection of all counties surveyed, though regional affiliations may vary by producer.

CONDUCTING THE SURVEY

Two versions of the survey were administered over two time periods:

Round 1 (February 2022 - April 22)

The first round of surveying focused on collecting data from GAP certified producers within a 100-mile radius of Syracuse City School District (SCSD).

Round 2 (December/August 2023-May 2024)

After A Regional Foodshed Approach to Farm-to-School: Cultivating Supply Chain Readiness in Central New York grant was awarded, staff from various CCE offices and SOFSA began reaching out to the remaining producers in the Producer Database.

The surveys from the two time periods are analyzed together because the questions were not materially changed between the two rounds.

RESULTS

In total, there are 142 complete, unique survey responses for a response rate of 49 percent. This does not include surveys when voicemail messages were left but unreturned or the survey was too incomplete to gain meaningful information. A few incomplete surveys captured producer data but did not include the producers' names. Incomplete surveys were omitted from analysis when the producer name was missing.

PRODUCER DEMOGRAPHICS

The survey respondents covered a wide range of products grown in Central NY and the surrounding regions. 43 farms surveyed grow fruits and vegetables, 18 producers raise beef, and 12 produce maple. Six farms surveyed produced dairy, six raise chicken and pork, and five farms produce apples. About 37 surveyed producers classified themselves as small-sized; about 30 classified themselves as medium-sized; 20 classified themselves as large. The remaining respondents did not provide information about farm size.

47 farms indicated that they do wholesale. 68 producers indicated that they sell direct to consumers through Community Supported Agriculture (CSA), farmers markets, and on farm locations such as roadside stands. Surveyed producers supply products wholesale to grocery stores, restaurants, and other retail outlets (hotels, bakeries, cafes), food hubs and grower cooperatives, and distributors. Fluid milk, maple, and apples were supplied wholesale for further processing and distribution.

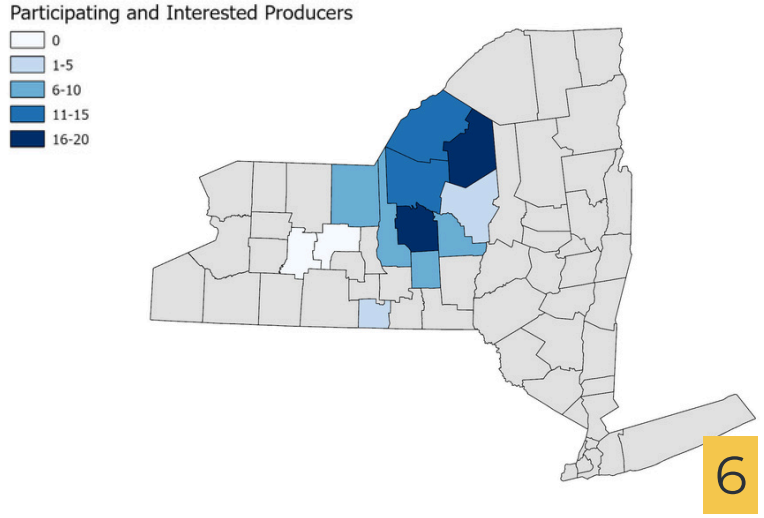
Farms surveyed had a wide range of certifications and processing capacities. 13 producers were Good Agricultural Practices (GAP) certified, 12 producers were Certified Organic, and 12 producers were NYS Grown and Certified. Producers considered additional certifications but have not pursued them due to the time needed for training, lack of demand from existing customers for the certifications, and the cost of certifications. 29 producers had washing and packaging capacity primarily for vegetables, 16 farms sent their meat products to USDA facilities to be processed, 12 farms processed maple and honey, and 8 farms processed dairy and other value-added products.

Of the producers surveyed, 11 farms indicated that they currently sell products to schools. 56 producers said they are not interested in participating in Farm to School and 72 surveyed producers said that they are interested to participate in F2S or at least interested to learn more about Farm to School.

11 CURRENTLY PARTICIPATING

72 EXPRESSED INTEREST

56 NOT INTERESTED



BARRIERS

For the 56 producers that were not interested in Farm to School, about one in ten perceived their farming operations to be too small in size or scale to participate in Farm to School. Another ten percent of surveyed producers indicated that they were no longer farming or had retired from farming. Other reasons producers indicated that they were not interested in participating ranged from no longer growing produce, a concern about the mismatch in timing between harvest and when schools are looking to purchase produce, and a lack of certifications.

11 producers previously participated in F2S but are not currently participating. Producers who no longer participate in F2S provided schools with apples, pumpkins, lettuce, celery, ground beef, squash, beets, and tomatoes. Only one producer did any processing of their products before supplying to schools. All producers who no longer supply to schools self-distributed their products to the schools.

The reasons stated for ceasing to sell to schools included the time required to deliver products, the administrative work associated with selling to schools, misalignment with harvest and schools in session, and being unable to meet school districts' price points. COVID was cited as a reason that two producers stopped doing Farm to School. Some producers said they would reconsider supplying to schools if products could be picked up on the farm or at a central location. Logistics and profit margins deterred some producers from re-engaging in F2S.

Producers interested in Farm to School shared a few reasons they are not currently selling to schools. About 1 in 4 producers said they had not heard about the opportunity, or they are unsure how to begin selling to schools. 20 producers shared that production or labor constraints would make it difficult to sell to schools, 12 producers said the price point is too low compared to other markets, and 19 producers shared that the logistics of selling to schools such as bidding, delivery, access to processing, and required certifications have stopped them from participating. Five producers shared they do not think their product is the right fit for schools due to seasonality or the type of product.

"The limited budget that schools have for food make it difficult for small farms like ours to participate in farm to school programs... It doesn't make sense to grow a dedicated crop to sell to wholesale markets because wholesale food prices don't pay the costs of growing the food on our scale, especially with rising wages. If I am wrong about any of that I would love to know as it would be great to contribute veggies from our small, sustainable farm to schools and extra sales would also be helpful to our farm."

INCENTIVES THAT WOULD MOVE PRODUCERS TO CONSIDER PARTICIPATING IN F2S

Producers shared a few different incentives that would lead them to consider selling their products to schools. 44 percent of them shared that **financial motivations** such as a higher price point for their produce, subsidies for schools to purchase local foods, or grants to producers would support their participation. “Sourcing to local schools is ideal, but currently is not worth it because of the price point.”

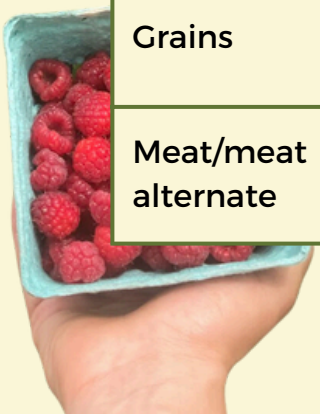
Seven producers mentioned that an **easier administrative process**, especially for submitting formal bids, would incentivize them to participate. 12 producers said that having a **centralized point for distribution** would make them more interested in participating in Farm to School. One farm shared a process that they could see working for their operation:

> “A cooperative of small/mid-size farms to sell product into the group, they aggregate the product for bid and then sell to schools.”

PRODUCTS AND LOGISTICS

11 farms are currently selling into school markets and their offerings cover the five components that must be offered as part of a school lunch: milk, fruits, vegetables, grains, and meat/meat alternates.

Vegetables 	Asparagus, sweet potatoes, onions, leaf lettuce, cabbage, sweet corn, kale, bell peppers, carrots, potatoes, lettuce, tomatoes, radishes
Fruits 	Apples
Fluid Milk 	Chocolate milk
Grains 	Rolled oats
Meat/meat alternate 	Ground beef, chicken nuggets, pork sausages, hot dogs, beef patties, low fat yogurt, eggs



Other items producers that producers not currently selling to schools could provide include maple syrup, honey, pears, plums, strawberries, grapes, blueberries, butternut squash, spaghetti squash, brussels sprouts, cucumbers, beets, collard greens, garlic, cabbage, and skim and 1% milk.

Half of the producers interviewed would be willing to aggregate products with other producers to fulfill demand of school districts if they could not meet it on their own. 60 percent of producers were willing to increase their own production to meet the needs of school districts as long as the market was viable.

TRAININGS

77 percent of producers were open to attending trainings on Farm to School. 22 producers wanted to learn more about bidding specifically and 14 producers wanted to learn more about the various requirements needed for selling to schools including any food safety requirements. 11 producers were looking for a "how to" overview of each step involved in making a sale to a school. 10 producers were interested in meeting with the Food Service Directors and those purchasing the products to learn more about what products would be most needed.

"How to navigate reaching out to schools in a professional way; understanding bidding process and formatting for sales. We currently send availability list that we send to restaurants/grocery stores - if I put in a large bid, I'd like to provide all the carrots for the year instead of small week by week ordering. What quantities/numbers are schools looking for?"

SUCCESS AND OPPORTUNITIES

The producers surveyed that are currently selling their products to school districts shared a few different successes and opportunities. A USDA meat processor located in the North Country noted that different schools reached out to them directly looking to source local meat products for their school districts. They can accommodate delivery of product to each school since they already have the infrastructure of a delivery truck and delivery driver set up for product delivery routes to other sales outlets.

They also sell a variety of meat types and cuts that are of interest to schools. Currently, this producer is supplying ground beef, beef patties, sausage, bacon, and chicken to schools. Having the variety of meat cuts that are of interest to school districts and a method of delivery is a benefit when schools are considering whether they should and can purchase product locally.

Another meat producer located in Jefferson County successfully began supplying product to schools when a Food Service Director reached out to them directly looking for product. This producer has a variety of meat products that schools are looking to purchase (i.e. ground beef, beef patties, chicken, bacon, sausage). They have existing delivery routes and infrastructure for other markets.

A diversified vegetable farm in Oswego County has experienced some opportunities for improvements as they begin selling to schools. They offered free delivery and no minimums, but orders were smaller than the producer anticipated. The farm also found that the products being requested by school food authorities were not always in alignment with the products grown in NY. For example, one SFA wanted Russet potatoes and was not open to a similar variety that is widely grown in NY.

RECOMMENDATIONS

AGGREGATION AND PROCESSING

The most common reason producers gave as a barrier to participating in Farm to School was a perception that their operation is too small. Aggregation of products is one answer to this barrier, as evidenced by the success that the meat producers and aggregators have found in Central NY and surrounding regions. Half of producers interviewed were willing to partner with other farms to meet the demands of school districts. Existing aggregation options are available through nine food hubs across NY state that are actively selling to school markets as well as other processors and producers that aggregate products from multiple farms.

While most meat producers surveyed sent their products to USDA facilities to be processed, the vegetable farms were primarily distributing products to their existing markets without further processing. Some school districts do not have the equipment or labor capacity to handle large volumes of unprocessed produce and need products to be minimally processed. Labor savings can be realized when processing of aggregated product happens at a central location.

Existing state grants such as the Resilient Food Systems Infrastructure Grant and the Regional School Food Infrastructure Grant address aggregation and processing of local farm products. Continuing to fund these activities in the local food supply chain will strengthen access to school food markets by producers of all sizes and scales.

MARKET OPPORTUNITY

Farmers that had participated in F2S in the past and those that were interested in participating in the future were concerned about both the price and the demand for local products by school districts. For smaller operations that are not currently selling into wholesale markets, this concern was heightened. Producers suggested three ideas that might assist them in entering the Farm to School market: schools accepting higher price points for local products, subsidies for schools to spend on local food, and grants for producers.

School districts must follow proper public procurement procedures, which typically results in the lowest price winning a bid. However, starting July 1, 2024, schools are now able to use local as a specification on formal bids for unprocessed products. The change allows NY products to compete with NY products on price when formal bids are awarded, and non-NY products do not meet the specification.

Subsidies for schools to spend on local foods have been realized in the form of grants and the 30% NYS Initiative. School food authorities (SFAs) were eligible for non-competitive grants for money to spend on local food products through the Local Foods for Schools (LFS) Cooperative Agreement that runs from March 2023 to February 2025. Awards were based on the number of students participating in school meal programs. The USDA announced in October 2024 an additional $500 million investment into LFS. For grants to producers, agricultural producers or groups of agricultural producers are eligible for the USDA Patrick Leahy Farm to School grants. The 30% NYS Initiative provides an additional state reimbursement of $0.19 per meal for schools that spend 30 percent of their lunch budget on NY food products.

For some farms selling products to schools, the producer was disappointed that the orders were not larger and more consistent for products purchased off formal bids and through informal methods. They also cited an uncertainty of how schools would use their products or a mismatch between the products that schools want to procure locally and those produced locally. Strengthening relationships between Food Service Directors and farmers could help to increase awareness of the challenges both sides face and lead to innovative solutions.

TRAININGS AND TECHNICAL ASSISTANCE

Information about the bidding process was the most requested training by producers. Most producers shared that their certifications are based on their existing markets, though some mentioned certifications as a reason they would not be able to sell to schools because of their assumption that GAPs or other certifications are required to sell to school markets. Certifications would only be prohibitive for a small number of farms such as meat and poultry producers with exemptions that require them to sell directly to customers. Clear information about the requirements to participate in bids or sell to school districts should be included in any training and technical assistance geared towards producers. There are many existing resources on Farm to School (Appendix) as well as 1:1 technical assistance and workshops conducted by CCE Harvest NY Regional Farm to School Coordinators.

CONCLUSION

In conclusion, Central NY farms produce a wide variety of products that could be sold into school food markets and producers are generally interested in selling to school districts. Continued financial and technical support is needed to demystify the bidding process, improve logistical access and aggregation opportunities, and build relationships between farms and schools. Ultimately, there is tremendous potential in Farm to School to strengthen the local food economy and provide students across the region and state with increased access to local, fresh foods.

APPENDIX

FARMS PER COUNTY IN CNY

County	# Farms	Farmland in Acres	Average Farm Size in Acres	Market Value Products Sold
Cayuga	747	222,764	298	$ 461,927,000
Cortland	397	91,594	231	$ 108,134,000
Jefferson	749	249,497	333	$ 238,933,000
Lewis	476	151,420	318	$ 178,605,000
Madison	657	170,530	260	$ 190,699,000
Oneida	834	187,672	225	$ 190,072,000
Onondaga	572	164,239	287	$ 271,488,000
Oswego	592	85,696	145	$ 68,858,000
TOTAL	5,024	1,323,412	2,097	$ 1,708,716,000

USDA NASS, 2022

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APPENDIX

FARM TO SCHOOL RESOURCES

Several farm-to-school resources exist for farmers, schools, children, parents, and organizations interested in farm-to-school work.

1. New York State Dept. of Agriculture & Markets Farm-to-School
2. Cornell Cooperative Extension (CCE) Harvest NY Farm to School
3. Cornell Cooperative Extension (CCE) Farm to School Resources
4. New York State Education Dept. Farm to School
5. New York State Education Dept. Farm-to-School Training and Guidance
6. United States Dept. of Agriculture (USDA) Farm-to-School Program
7. USDA Farm-to-School Resources
8. USDA Farm-to-School Planning Toolkit
9. USDA Farm-to-School Menu Planning Toolkit
10. Farm Aid Farm-to-School Rocks! Resources
11. Sustainable Agriculture Resource and Education (SARE) Farm to School Training Toolkit
12. Farm to Institution New York State (FINYS)
13. FINYS Resources
14. National Farm to School Network Resources