

Farm to Institution: Producer Perspectives

Introduction

Dear New England Agricultural Producer,

Farm to Institution New England (FINE) is conducting research related to our mission of increasing sales from farms to institutions (e.g., schools, colleges, and hospitals). We are interested in your unique perspective on marketing and selling to institutions. We are surveying producers from around New England and *we want to hear from you, even if you do not currently sell to institutions*

Results from this survey will help us understand how and when institutional markets are valuable for New England farms, and to reveal the challenges and opportunities New England farmers face in selling to these markets. State agencies, technical assistance providers, and others will be able to use our findings to improve their strategies and outreach efforts related to the region's farm to institution sector.

We really want to hear from you, and we know your time is valuable. As an incentive to participate we are giving away **five \$100 gift cards**. Just provide your contact information at the end of the survey to enter our raffle.

The survey should take between 5 and 20 minutes to complete.

All responses will be kept confidential. Information will be published in summary format only and will not be traceable to any individual farm.

If you have any questions about this survey, please contact the external evaluator Lydia Oberholtzer at lydiaoberholtzer@gmail.com. For questions about FINE, please contact Nessa Richman at nessa@farmtoinstitution.org.

Thank you again for your feedback and time!

Sincerely,

Peter Allison
Network Director
Farm to Institution New England

FINE is a six-state network working to strengthen our regional food system by increasing the use of New England food by New England institutions.

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About Your Farm

1. What is the name of your farm? (We ask this question to ensure that duplicate surveys are not completed by one farm; we will not publish this information.)

2. In which of the following New England states do you currently farm? (Please check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> New Hampshire |
| <input type="checkbox"/> Maine | <input type="checkbox"/> Rhode Island |
| <input type="checkbox"/> Massachusetts | <input type="checkbox"/> Vermont |

3. How many total acres did you have in production (including leased land) in 2015 and 2012 (if applicable)? We ask about 2012 because it was an Agricultural Census year and the answers can be compared to state level data. Please estimate.

2015 total acres in production

2012 total acres in production

4. Please estimate the farm operation's total gross sales (from all products) in 2015.

5. Please *estimate* the percentage of your farm's 2015 total gross sales by the product categories listed below. (Numbers should add up to 100%.)

Fresh fruits

Fresh vegetables

Meat, poultry, and eggs

Fish

Milk and dairy

Nursery items (including plants, mushrooms, cut herbs, and flowers)

Value added food products (e.g., processed/prepared food, baked goods, and preserves)

Other food products

Other non-edible farm products

6. Please *estimate* the percentage of your gross sales made to each of the following marketing outlets in 2015. (Numbers should add up to 100%.)

Direct to institution (schools, hospitals, colleges, prisons, etc.)

Direct to consumer markets (farmers markets, farm stands, CSAs, etc.)

Direct to retail (supermarkets, cooperatives, restaurants, etc.)

Wholesale/distributors/food hubs

Distributed through farm cooperative/other farmers

Other outlets

7. Do you sell any of your agricultural products DIRECTLY to institutions? (*Direct sales* are defined as sales from the producer directly to the end user of the product.)

In this case, direct to institution means direct sales to users such as K-12 schools, colleges, hospitals, prisons, and other institutions.

- Yes
- No
- I don't know

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Selling to Institutions

Please tell us about your experience selling **DIRECTLY** to institutions (e.g., K-12 schools, colleges, hospitals, prisons, and other institutions).

Institutions DO NOT include distributors, food hubs, wholesalers, conference centers, sports stadiums, grocery retailers, etc. We will ask about these later on. Only information regarding those sales made DIRECTLY to institutions should be provided below.

8. Please estimate the value of your sales (in dollars \$) made *directly* to institutions in 2012 and 2015?

2012	<input type="text"/>
2015	<input type="text"/>

9. How many years have you been selling products *directly* to institutions?

10. Approximately what percent of your total sales made *directly* to institutions was accounted for by the following outlets in 2015? (This should add up to 100%.)

K-12 schools %

Colleges and universities %

Hospitals %

Other institutions (e.g. prisons) %

11. Have you grown or produced any NEW products specifically for institutions? This includes processing existing crops for institutions (e.g., peeling butternut squash), but does not include simply increasing volume of something you currently produce.

- No
- Yes (detail new products here)

12. Please list the top five products you sold *directly* to institutions in 2015 (rank them by value in dollars, but do not include the dollar amount). Please be as specific as possible (e.g., apples, ground beef, broccoli).

Product 1

Product 2

Product 3

Product 4

Product 5

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Perspectives on Selling Directly Institutional Marketing

13. Do you aggregate products from other farmers to sell to institutions?

- Yes
- No, but I am interested
- No, and I am not interested
- I don't know

If you answered yes above, how many farmers do you buy products from to sell to institutions?

14. Have you ever entered into formal or informal pre-season agreements with institutions? (Please check all that apply.)

- Yes, informal pre-season agreements
- Yes, formal pre-season agreements
- No
- I don't know

15. Think back to when you first started selling *directly* to institutions. Since that time, how have the following things changed for your farm?

	Increased greatly	Increased some	Stayed the same	Decreased some	Decreased greatly
Percentage of overall sales from institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Percentage of profits from institutional sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Variety of products sold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. How interested are you in expanding or starting *direct* sales to the following institutional markets in the next 5 years?

	Very interested	Moderately interested	Slightly interested	Not at all interested	I don't know
Public K-12 schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private K-12 schools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Colleges and universities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospitals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify):

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Benefits of Selling Directly to Institutions

Please tell us some of the reasons you sell *directly* to institutions.

17. When considering sales *directly* to institutional customers, how much do you agree with the following statements.

I sell directly to institutions because institutions.....

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Are a market for surplus or seconds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide reduced marketing costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have reliable/advance contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide a fair price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide a stable price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are an additional market for products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feed low-income individuals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build relationships with local community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide large volume orders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide reduced distribution costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify other reasons you sell to institutions.

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Challenges to Selling Direct to Institutions

Please tell us about some of the barriers of selling *directly* to institutions.

18. How significant are the following barriers for you when selling *directly* to institutions?

	Major barrier	Somewhat of a barrier	Minor barrier	Not a barrier at all	Not applicable
Seasonality of my products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transporting product to institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional interest in my products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volume needs of institutions are too small	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volume needs of institutions are too large	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

19. How significant are these other barriers for you when selling *directly* to institutions?

	Major barrier	Somewhat of a barrier	Minor barrier	Not a barrier at all	Not applicable
Prompt payment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product or packaging requirements (e.g., size, quality, or grade)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Processing requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low purchase price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety requirements and/or FSMA compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Liability insurance costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing/maintaining buyer relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contract/bidding process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

20. Are there any other barriers you would like to mention?

ONLY THREE PAGES LEFT!

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Interest in Future Sales Directly to Institutions

21. Are you interested in selling your products *directly* to institutions in the future? If no, please share the reasons why.

- Yes
- Maybe
- No
- If no, please describe the reasons you are not interested (including telling us about any past experiences).

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Benefits of Institutional Markets

22. When considering sales *directly* to institutions, how much do you agree with the following statements.

I am interested in selling directly to institutions because institutions.....

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Are a market for surplus or seconds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have reduced marketing costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have reliable/advance contracts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide a fair price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide a stable price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are an additional market for products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feed low-income individuals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build relationships with local community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide large volume orders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have reduced distribution costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify other reasons you sell to institutions.

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Challenges of Selling Directly to Institutional Markets

Please tell us about some of the challenges you perceive in selling directly to institutional markets.

23. How significant are the following barriers for you when considering selling *to directly* to institutions?

	Major barrier	Somewhat of a barrier	Minor barrier	Not a barrier at all	Not applicable
Seasonality of my products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transporting product to institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional interest in my products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volume needs of institutions are too small	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Volume needs of institutions are too large	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

24. How significant are these other barriers for you when considering selling *to directly* to institutions?

	Major barrier	Somewhat of a barrier	Minor barrier	Not a barrier at all	Not applicable
Prompt payment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product or packaging requirements (e.g., size, quality, or grade)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Processing requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low purchase price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food safety requirements and/or FSMA compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Liability insurance costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing/maintaining buyer relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contract/bidding process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. Are there any other barriers you would like to mention?

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Sales to Institutions through Intermediaries or Aggregators

26. In 2015, did you sell any of your products to an intermediary or aggregator (e.g., distributor, wholesaler, food hub, or other farmer) that in turn sold your products to an institution (school, college, hospital, etc.)?

- Yes
- No
- I don't know if the intermediary sells my products to institutions

27. If you answered yes above, please list the top five products you sold to an intermediary in 2015 that were in turn sold to institutions (rank by value in dollars, but do not include the dollar amount). Please be as specific as possible (e.g., apples, ground beef, broccoli).

Please SKIP if you answered "no" or "I don't know" to the question above.

Item 1	<input type="text"/>
Item 2	<input type="text"/>
Item 3	<input type="text"/>
Item 4	<input type="text"/>
Item 5	<input type="text"/>

28. What are the main benefits of selling through these intermediary channels for you (e.g., price, reliability, use of seconds/lower grade product)?

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About Your Farm

Please tell us a bit your experience farming and your farm. This information will help us analyze challenges and benefits presented by the farm to institution market for distinct groups of farmers. This information remains confidential and will not be used to identify you in any way.

29. How many years have you been a farmer?

30. What food safety certifications do you currently have, if any? (Please check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> Audited Good Agricultural Practices (GAP) | <input type="checkbox"/> Good Manufacturing Practices (GMP) |
| <input type="checkbox"/> Good Handling Practices (GHP) | <input type="checkbox"/> HACCP |
| <input type="checkbox"/> Other (please specify) | |

31. What other certifications do you have or label claims do you make, if any? (Please check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> Organic certification | <input type="checkbox"/> Grass Fed |
| <input type="checkbox"/> GMO-free | <input type="checkbox"/> rBGH/rBST-Free |
| <input type="checkbox"/> Animal welfare approved | <input type="checkbox"/> Certified Humane |
| <input type="checkbox"/> Other (please specify) | |

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Final Questions and Comments

32. What is your gender?

33. What is your age?

34. What is your race/ethnicity? (Please check all that apply.)

- Black/African or Caribbean American
 Hispanic or Latino
 White/Caucasian
 Asian or Pacific Islander
 American Indian or Alaska Native
 Other (please specify)

35. Thank you for filling out this survey! To enter a drawing for one of five \$100 gift cards please write your name, phone number, and/or email address below. *This information will be kept separate from your responses and will be deleted once the survey is closed.*

Name

Phone

Email address

36. Please check below if you are interested in the following:

	Yes	No
Receiving a copy of the survey results when available?	<input type="radio"/>	<input type="radio"/>
Receiving technical assistance from organizations and agencies that work with FINE to assist farmers with strategies to increase sales to institutions?	<input type="radio"/>	<input type="radio"/>
Participating in a follow-up interview about sales to institutions?	<input type="radio"/>	<input type="radio"/>

If you answered yes to any of the above, please provide your name, email address and/or phone number here.

37. How did you hear about this survey? (Please check all that apply.)

- Online
- Email newsletter
- State department of agriculture
- Technical assistance provider
- Word of mouth
- Social media

If applicable, who told you about this survey? We'd like to thank them!

38. Do you have any final comments?