

OMB No. 0582-0287

**FARMERS' MARKET AND LOCAL FOOD PROMOTION PROGRAM (FMLFPP)**  
**Ecotrust Final Performance Report for Grant #16-LFPP-OR-0033**

The final performance report summarizes the outcome and activities of your FMLFPP award objectives. Failure to submit acceptable closeout reports for an existing grant within 90 calendar days following the grant end date may result in exclusion from future AMS grant opportunities.

This final report will be made available to the public once it is approved by FMLFPP staff. Write the report in a way that promotes your project's accomplishments, as this document will serve as not only a learning tool, but a promotional tool to support local and regional food programs. Particularly, recipients are expected to provide both qualitative and quantitative results to convey the activities and accomplishments of the work.

The report is due within 90 days of the project's performance period end date (as noted in box 15 of your grant agreement (AMS-33), or sooner if the project is complete. The report must be typed single-spaced in 11-point font, not to exceed fifteen (15) 8.5 x 11 pages (excluding existing Final Performance Report form content). For example, if the Final Performance Report form is six (6) pages before you begin entering your project information into the form, your report may be up to 21 pages (6 pages + 15 pages).

Provide answers to each question and all applicable outcome and indicators as it applies to your project. If you are unable to provide a response explain why. It is preferred that you email your completed performance report to your assigned FMLFPP Grants Management Specialist to avoid delays. In case of any extraordinary reason a faxed report can be accepted; please notify your assigned Grants Management Specialist to inform about your submission.

<b>Report Date Range:</b>	September 30, 2016 – March 31, 2018
<b>Date Report Submitted:</b>	May 6, 2018
<b>Grant Agreement Number:</b>	16-LFPP-OR-0033
<b>Recipient Organization Name:</b>	Ecotrust
<b>Project Title as Stated on Grant Agreement:</b>	Establishing Markets for Local Proteins
<b>Authorized Representative Name:</b>	Adam Lane, CFO/COO
<b>Authorized Representative Phone:</b>	(503) 467-0753
<b>Authorized Representative Email:</b>	<a href="mailto:adam@ecotrust.org">adam@ecotrust.org</a>
<b>Year Grant was Awarded:</b>	2016
<b>Amount of Award:</b>	\$94,841

FMLFPP staff may contact you to follow up for long-term success stories. Who may we contact?

Same Authorized Representative listed above (check if applicable).

Different individual:

**Name:** Stacey Sobell

**Email:** [ssobell@ecotrust.org](mailto:ssobell@ecotrust.org)

**Phone:** 503-467-0751

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**1. Executive Summary—In 200 words or less, describe the project’s need, purpose, goals, and quantifiable outcomes:**

Many small farms and community fishermen wish to build their markets by increasing domestic consumption of and access to regionally produced food. They are also interested in expanded access to local institutional markets to allow them to move higher volumes of product and run more reliably profitable businesses. In Establishing Markets for Local Proteins we aimed to develop and test a framework for Institution Supported Agriculture, a scaled-up version of Community Supported Agriculture appropriate to institutions and other large-scale food buyers seeking to source local protein from regional farmers, ranchers, and fishermen. We pulled together a small cohort of institutional buyers and followed their lead on desired proteins of focus, hosting a blended burger sensory testing event with a ranch partner, hosting a local and underloved fish culinary demo, and sending local protein promotions out to a broader group of foodservice buyers. Outputs from the project include a guide to whole hog purchasing for foodservice chefs, a forward contracting research summary and template, a guide to local and sustainable seafood in our region, and local fish recipes developed for foodservice. Key outcomes include a 12% increase in customer counts for participating suppliers and nearly 319,000 meals served including local proteins!

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0581- 0287. The time required to complete this information collection is estimated to average 4 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, age, disability, and where applicable sex, marital status, or familial status, parental status religion, sexual orientation, genetic information, political beliefs, reprisal, or because all or part of an individual's income is derived from any public assistance program (not all prohibited bases apply to all programs). Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at (202) 720-2600 (voice and TDD). To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (800) 795-3272 (voice) or (202) 720-6382 (TDD). USDA is an equal opportunity provider and employer

**2. Please provide the approved project’s objectives:**

Objectives		Completed	
		Yes	No*
1	Support a small group of institutions (3–5), in selecting geographically and seasonally appropriate proteins for testing in an ISA model and in conducting harvest planning with a group of local ranchers and fishermen.	X	
2	Identify and work with a network of ranchers and fishermen to explore whole animal purchasing models, allot a portion of their production to the ISA project, and aggregate their production to meet the volume demands of participating institutions.	X	
3	Assess short-term impacts of the planning project and prepare for project implementation.	X	

***\*If no is selected for any of the listed objectives, you must expand upon this in the challenges section.***

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**3. List your accomplishments for the project’s performance period and indicate how these accomplishments assisted in the fulfillment of your project’s objectives. Please include additional objectives approved by FMLFPP during the grant performance period, and highlight the impact that activities had on the project’s beneficiaries.**

*\*Note, please make sure to compare this list to the Revised List of Objectives, Outcomes, and Indicators that is submitted as a separate attachment (originally submitted to USDA with our revised narrative January 2018). As noted when we submitted the revised narrative to USDA, in our original proposal, some of the formatting had caused errors in the numbering of the objectives, outcomes, and indicators.*

<b>Accomplishments</b>	<b>Relevance to Objective, Outcome, and/or</b>
Hosted Local Link, a vendor fair for institutional foodservice, featuring 8 protein suppliers and 28 total vendors at the Redd on Salmon Street on October 11 <sup>th</sup> , 2017.	<ul style="list-style-type: none"> <li>• Objective 2</li> <li>• Outcome 1, Indicator 1. (a)-(c) &amp; 2. (a) &amp; (b)</li> <li>• Outcome 3, Indicator 2. (a) &amp; (b)</li> </ul>
Hired a contractor to support project evaluation and collection of baseline data (October 2017).	<ul style="list-style-type: none"> <li>• Objective 3 (in service to evaluating final results for ALL selected outcomes and indicators)</li> </ul>
Developed promotional emails in partnership with six local protein producers (Carman Ranch, Pure Country Pork, Lonely Lane Farms, Wilder Land & Sea, Don Felipe Products, and Dayton Natural Meats) to send promotions of products directly to our alliance of 81 institutional foodservice purchasers (serving more than 213,000 meals each day).	<ul style="list-style-type: none"> <li>• Objective 2</li> <li>• Outcome 2, Indicators 1. &amp; 2.</li> <li>• Outcome 3, Indicator 1.(f) and Indicator 2.(a)&amp;(b)</li> </ul>
Developed a Beta Tester group of 11 institutional foodservice buyers (executive chefs and foodservice or nutrition service directors/managers) from 7 different types of institutions to taste and offer feedback on four different prototypes for a new grass-fed beef product blended with plant-based proteins (LFPP funds were not used to purchase food). Cumulatively, the institutions who comprised the group serve just over 27,000 meals each day (ranging from 300 to 8,000).	<ul style="list-style-type: none"> <li>• Objective 1</li> <li>• Outcome 1, Indicator 1. (a)-(c) &amp; 2. (a) &amp; (b)</li> </ul>

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<p>Hosted a Blended Burger Sensory Tasting on February 11th, 2018 in partnership with Carman Ranch and Dick's Primal Kitchen. Part market research and part education, the tasting featured four different prototypes of a grass-fed beef burger blended with mushrooms, designed specifically for foodservice. The four prototypes included blanched and raw local mushrooms in ratios from 25-40%, and included samples with a whole foods scratch starter concentrate made by NOBULL, a Portland based food company. Ecotrust helped to plan, host, and evaluate the sensory test. Please note that LFPP funds were not used to purchase food. All food products for this tasting (beef, mushrooms, concentrate) were donated. As a result of this tasting, Carman Ranch was able to identify the preferred prototype (75% beef, 25% raw local mushrooms) and collect feedback from buyers on institutional purchasing considerations such as preferred format, packaging, delivery, and price sensitivity. After the tasting, Carman Ranch reported readiness to sell the 25% raw mushroom blend to institutions, starting immediately, and reported a purchasing agreement with one foodservice buyer to purchase their initial batch of 2,000 lbs. A full analysis of the sensory test is available as a separate report, upon request.</p>	<ul style="list-style-type: none"> <li>• Objectives 1, 2, &amp; 3</li> <li>• Outcome 1, Indicator 1. (a)-(c) &amp; 2. (a) &amp; (b)</li> <li>• Outcome 2, Indicators 1. &amp; 2.</li> <li>• Outcome 3, Indicator 1.(f) and Indicator 2.(a)&amp;(b)</li> </ul>
<p>Hosted a Local &amp; Underloved Fish Culinary Demo at the University of Portland's main dining hall on March 14<sup>th</sup>, 2018, bringing together 35 partners, including 20 foodservice staff. Professional chef and dietician, Garrett Berdan, developed two affordable recipes featuring underutilized Pacific Northwest fish species (dover sole and widow rockfish). These original recipes were scaled for volume foodservice and include nutritional analysis and meal pattern crediting for school and college foodservice. Two fish vendors also joined the training: Jessie's Ilwaco Fish Co. and Sea to Table. Documented in a video, the culinary demo helped educate buyers on sustainable seafood and resulted in the sharing of best practices between attendees. A request from school foodservice buyers at this training for a value-added product made with regional fish will be pursued via an upcoming implementation project. Resources from this training, including <i>Northwest Seafood Solutions for Foodservice</i>, a guide to local and sustainable seafood for institutions, the two recipes developed for foodservice, and the video of the training are available on our local proteins webpage at <a href="https://ecotrust.org/project/local-proteins/">https://ecotrust.org/project/local-proteins/</a>.</p>	<ul style="list-style-type: none"> <li>• Objective 2</li> <li>• Outcome 1, Indicator 1. (a)-(c) &amp; 2. (a) &amp; (b)</li> <li>• Outcome 2, Indicators 1. &amp; 2.</li> <li>• Outcome 3, Indicator 1.(f) and Indicator 2.(a)&amp;(b)</li> </ul>

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<p>Developed the whole animal model toolkit: <a href="#">“Going Whole Hog: A guide for foodservice chefs and cooks”</a>. This guide is available both electronically and as a hard copy printed version. A PDF version is also available.</p>	<ul style="list-style-type: none"> <li>• Objective 2</li> </ul>
<p>Developed a forward contracting template for use by institutions, producers, and/or distributors of local proteins. An accompaniment to the forward contracting research summary we shared as part of our progress report submission, this template provides sample product specifications and vendor requirements. It is designed as a jumping off point in forward contract development and is not meant to outline all considerations and content for a legally binding contract. Template is available upon request.</p>	<ul style="list-style-type: none"> <li>• Objective 2</li> </ul>
<p>Final impact evaluation (including quantified answers to all selected outcomes and indicators re: knowledge, intention, purchases, sales, customer counts, meals served, etc.).</p> <p>Developed a 3-year implementation project with partners to continue various threads of the work, with a focus on bringing a local value-added fish product to institutional markets and working with additional local suppliers to increase the availability of blended burgers. Project objectives appear below. This project was submitted to USDA AMS as a 2018 LFPP Implementation Proposal titled “Expanding Markets for Local Proteins: Training Wholesale Buyers, Developing New Products, Aggregating Demand, and Scaling up Supply in the Pacific Northwest” (contains a detailed implementation plan).</p> <p>Project objectives include:</p> <ul style="list-style-type: none"> <li>• Objective 1: Establish cross-sectoral institutional buyer cohort to aggregate demand and expand markets for selected protein products</li> <li>• Objective 2: Develop, test, and bring to market value-added protein products to meet institutional needs.</li> <li>• Objective 3: Provide outreach, training, and technical assistance to promote and expand the reach of the blended burger, whole hog, and other innovative models for use of local proteins.</li> <li>• Objective 4: Support local protein producers with the infrastructure to help them scale up production and explore opportunities to aggregate product from protein producers to create greater institutional and wholesale market access.</li> <li>• Objective 5: Work with vendors and distributors to determine a baseline to document the value of sales increases and percent change in customer count by the end of the project.</li> </ul>	<ul style="list-style-type: none"> <li>• Objective 3</li> <li>• Analysis of ALL selected outcomes and indicators</li> </ul>

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**4. Please list any challenges experienced during the project’s period of performance. Provide the corrective actions taken to address these issues.**

Challenges (Issues)	Corrective Actions and/or Project Changes (s)
<p>In our original proposal, we said we would draft a whole animal purchasing model for <i>at least two</i> proteins, having talked with buyers about doing this for hogs and cows. However, we made an intentional decision to develop a single whole animal model, for hogs, given feedback from partners.</p>	<p>We intentionally made the decision to produce a single whole animal model in consultation with our foodservice partners who decided they were unlikely to purchase whole cows, unless it was coordinated with other buyers via an outside party. They expressed that they were more interested in pursuing a blended burger model and learning more about local fish opportunities, so we used our resources to instead host and analyze the Blended Burger Sensory Test and to produce the local and underloved fish demo, including a guide to seafood, two recipes, and a video.</p>
<p>We realized partway through the project that we would really benefit from professional evaluation support.</p>	<p>We were able to use match funding to hire an evaluation contractor to support data collection and analysis. This was especially helpful in collecting and analyzing sales revenue and purchasing data.</p>

**5. Quantify the overall progress on the outcomes and indicators of your project. Include further explanation if necessary.**

**Outcome 1: To Increase Consumption of and Access to Locally and Regionally Produced Agricultural Products.**

Indicator	Description	Number
1.	Total number of consumers, farm and ranch operations, or wholesale buyers reached	127
1.a.	The number that gained knowledge on how to buy or sell local/regional food OR aggregate, store, produce, and/or distribute local/regional food	105
1.b.	The number that reported an intention to buy or sell local/regional food OR aggregate, store, produce, and/or distribute local/regional food	115
1.c.	The number that reported buying, selling, consuming more or supporting the consumption of local/regional food that they aggregate, store, produce, and/or distribute	30

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2.	Total number of individuals (culinary professionals, institutional kitchens, entrepreneurs such as kitchen incubators/shared-use kitchens, etc.) reached	90
2.a.	The number that gained knowledge on how to access, produce, prepare, and/or preserve locally and regionally produced agricultural products	78
2.b.	The number that reported an intention to access, produce, prepare, and/or preserve locally and regionally produced agricultural products	83
2.c.	The number that reported supplementing their diets with locally and regionally produced agricultural products that they produced, prepared, preserved, and/or obtained	Not applicable

**Outcome 2: Increase Customers and sales of local and regional agricultural products.**

Indicator	Description	Number
1.	Sales increased as a result of marketing and/or promotion activities during the project performance period.	
	Original Sales Amount (in dollars)	\$369,086
	Resulted Sales Amount (in dollars)	\$380,297
	Percent Change $((n \text{ final} - n \text{ initial})/n \text{ initial}) * 100 = \%$	3%
2.	Customer counts increased during the project performance	
	Original Customer Count	49
	Resulted Customer Count	55
	Percent Change $((n \text{ final} - n \text{ initial})/n \text{ initial}) * 100 = \%$ change)	12.2%

**Outcome 3: Develop new market opportunities for farm and ranch operations serving local markets.**

Indicator	Description	Number
1.	Number of new and/or existing delivery systems/access points of those reached that expanded and/or improved	
1.a.	Farmers markets	Not applicable
1.b.	Roadside stands	Not applicable
1.c.	Community supported agriculture programs	Not applicable
1.d.	Agritourism activities	Not applicable

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1.e.	Other direct producer-to-consumer market opportunities	Not applicable
1.f.	Local and regional Food Business Enterprises that process, aggregate, distribute, or store locally and regionally produced agricultural products	2
2.	Number of local and regional farmers and ranchers, processors, aggregators, and/or distributors that reported	
2.a.	An increase in revenue expressed in dollars	6
2.b.	A gained knowledge about new market opportunities through technical assistance and education programs	15
3.	Number of	
3.a	New rural/urban careers created (Difference between "jobs" and "careers": jobs are net gain of paid employment; new businesses created or adopted can indicate new careers)	Not applicable
3.b.	Jobs maintained/created	Not applicable
3.c.	New beginning farmers who went into local/regional food production	Not applicable
3.d.	Socially disadvantaged famers who went into local/regional food production	Not applicable
3.e.	Business plans developed	Not applicable

**Outcome 4: Improve the food safety of locally and regionally produced agricultural products.**

*Only applicable to projects focused on food safety!*

Indicator	Description	Number
1.	Number of individuals who learned about prevention, detection, control, and intervention food safety practices	Not applicable
2.	Number of those individuals who reported increasing their food safety skills and knowledge	Not applicable
3.	Number of growers or producers who obtained on-farm food safety certifications (such as Good Agricultural Practices or Good Handling Practices)	Not applicable

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**Outcome 5: Quantify the overall progress on this outcome indicator based on relevant project activities not covered above.**

*This indicator must reflect the project narrative's required additional outcome indicator.*

Indicator	Description	Number
1.	<b>Total number of meals served daily by institutions participating in the pilot</b>	16,890
2.	<b>Estimated number of meals served using local proteins provided via pilot</b>	318,969

Additional Results: Although not included in our original list of outcomes and indicators, we did list purchasing agreements as a milestone under objective 2. When we surveyed foodservice buyers, vendors, and distributors at the end of the project, a total of 15 buyers and 2 vendors said they developed new purchasing agreements as a result of this project.

**6. Discuss your community partnerships (include applicant staff and external partners).**

**i. Who were your community partners?**

a. Our community partners included the following applicant staff from Ecotrust who were listed on the original proposal and/or in our revised proposal submitted January 2018:

1. Amanda Osborne, Vice President, Food & Farms
2. Stacey Sobell, Director, Food & Farms
3. Tyson Rasor, Fish & Food Program Manager
4. Angela Hedstrom, Farm to School Coordinator

b. We also received support from the following applicant staff at Ecotrust:

1. Aaron Vargas, Food & Farms Coordinator

c. Our external community partners included:

1. Seven foodservice buyers from the NW Food Buyers' Alliance, from the following institutions:

- a. Airbnb corporate headquarters
- b. ElderHealth & Living
- c. Kaiser Permanente
- d. Multnomah County Department of Community Justice, Juvenile Division

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- e. Oregon Health and Sciences University
  - f. Sherwood School District
  - g. Willamette University
2. Two distributors: Corfini Gourmet, Wilder Land and Sea
3. Seven suppliers:
- a. Pure Country Pork
  - b. Carman Ranch
  - c. Lonely Lane Farms
  - d. Sea to Table
  - e. Dayton Natural Meats
  - f. NOBULL concentrates
  - g. Don Felipe Chorizo
4. Advisors:
- a. Health Care Without Harm
  - b. Oregon Tilth
  - c. Oregon Department of Agriculture
5. Contractors:
- a. Chef Garrett Berdan – fish culinary demo
  - b. Brian Kelley - video production for fish culinary demo (supported by match funds)
  - c. Devdeep Aikath – Data collection and analysis (supported by match funds)
6. Event venues:
- a. Dick's Primal Kitchen
  - b. University of Portland, Bauccio Commons
7. Event speakers
- a. Cory Carman, Owner of Carman Ranch
  - b. Tracie Gleffe, Executive Chef at Bend-LaPine School District
  - c. Jack Cheney, Business Development Manager at Sea to Table
  - d. Christa Svensson, Vice President at Jessie's Ilwaco Fish Co.

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e. Liam Pelot, Owner of Dick's Primal Kitchen

d. Changes from the original list include: The two additional Ecotrust staff listed above (Angela Hedstrom & Aaron Vargas) have helped with project coordination and wrap up. Angela was listed in the revised proposal submitted January 2018 and Aaron supported event coordination and final project wrap up in March 2018.

e. As noted in our progress report, there are also several suppliers who are listed in our original proposal who are not part of the current project. The reasons for this include: (a) do not supply the target proteins chosen by buyers (Botany Bay, Hawkins Sisters Ranch, and Lazy B all offer poultry or eggs, not beef or fish), (b) located outside USDA's 400 mile "local" range (Alaskan's Own), or (c) we determined that they are not at the right size/scale/price yet to serve institutional foodservice buyers regularly (6 Ranch and Port Orford Sustainable Seafood). As anticipated in our progress report, we brought on additional suppliers and distributors who best fit the expressed needs of the participating buyers (primarily grass-fed beef producers and fish and seafood suppliers).

f. Finally, as noted in our progress report, we also hired a contractor (Devdeep Aikath) to support project evaluation (paid for with matching funds).

**ii. How did they contribute to the overall results of the FMLFPP project?**

a. Ecotrust staff

1. Amanda – project oversight and guidance
2. Stacey – project management and reporting, buyer communication and relationships, communication with beef and pork vendors
3. Tyson – communication and relationships with fish and seafood vendors
4. Angela – project coordination and administration
5. Aaron – support for event coordination and final project wrap up

b. External partners

1. Institutional foodservice buyers from the NW Food Buyers' Alliance – provided information on desired product types, forms, volumes, and price points, and have participated in webinar, meetings, sensory test, fish demo, and field trips
2. Distributors and suppliers – contributed to development of whole animal model, made connections with buyers to sell product

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3. Advisors – provided guidance to shape relevant meetings and events as well as the direction of the project. Health Care Without Harm has helped with connections to hospitals specifically.
4. Contractors – provided institutional scale seafood recipes for and documented the Local & Underloved Fish Culinary Demo. Data collection and analysis.
5. Commercial Kitchens – provided certified commercial kitchen space to prepare local proteins and a venue to host events
6. Speakers – shared lessons learned and best practices for procuring and preparing local proteins

**iii. How will they continue to contribute to your project's future activities, beyond the performance period of this FMLFPP grant?**

- a. Members of the NW Food Buyers' Alliance (e.g., Portland Public Schools, Legacy Health Systems, Kaiser Permanente) will continue to advise this work and be involved in the next stage of project implementation.
- b. Vendors (e.g., Jessie's Ilwaco Fish Co. and Sea to Table) will also be involved in project implementation
- c. Health Care Without Harm will collaborate with Ecotrust to co-manage the implementation project.

**iv. What feedback have the partners provided (specific comments) about the results of the project?**

- a. Carman Ranch was thrilled with the results of the Blended Burger Sensory test. As noted earlier, they are moving forward with the winning blend (75% beef and 25% raw mushrooms) and selling the product to institutions, including the University of Portland.
- b. We heard from other grass-fed beef vendors, such as Deschutes River Ranch (via the Oregon Department of Agriculture), that they are interested in developing and testing different prototypes for burger blends, including different proteins and vegetables, such as lentils and sweet potato. We plan to pursue more extensive product development and sensory testing on burger blends via the implementation project.
- c. Two participating vendors, Sea to Table and Wilder Land & Sea, have told us that they are in the process of applying for their Bon Appetit Management Company certifications as a result of this project. While they do not have the certification yet, if they are able to acquire them, it will be really impactful as they will be able to reach a larger and dedicated audience, primarily of college and corporate foodservice.
- d. Sea to Table also told us that while they do not currently have any sales to institutions to report, they saw this project as presenting great future opportunities

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to connect their local dock relationships and distribution capacity with institutions seeking regional seafood.

e. Whitney Ellersick at Portland Public Schools (and other school foodservice buyers who attended the fish demo event) was extremely excited to pursue a value-added local fish product for schools and will continue to partner with us on the implementation project. In addition, Jessie's Ilwaco Fish Co. and Sea to Table are eager to be involved in the development of this product and will participate in the implementation phase.

f. The Oregon Department of Agriculture was excited by the results of both the blended burger test and the fish culinary demo and connected us to Oregon State University Extension's Food Innovation Center, Seafood Lab, and Niche Meat Processors to support supply chain research, product development, and sensory testing as part of the implementation phase.

g. We released the guide "Going Whole Hog: A guide for foodservice chefs and cooks" just in advance of a workshop at the National Farm to Cafeteria Conference in Cincinnati, Ohio and received fantastic feedback from stakeholders across the country who attended. Two of our partners, Andre Uribe at Willamette University and Zack Agopian at meat distributor Corfini Gourmet, who are the masterminds behind the origin of the whole hog model were extremely excited about the guide we produced and are eager to help provide live whole hog trainings for other foodservice buyers as part of the implementation phase.

**7. How do you plan to publicize the results?****i. To whom (i.e. people, entities) do you plan to publicize the project results?**

a. Attendees at the National Farm to Cafeteria Conference in Cincinnati, Ohio, which is attended by 1,000 diverse stakeholders from across the US and Canada working to source local food for institutional cafeterias.

b. Stakeholders of our non-profit, Ecotrust, via a Local Proteins project summary and webpage on [ecotrust.org](http://ecotrust.org).

c. Members of the NW Food Buyers' Alliance via our e-newsletter: 336 foodservice staff, vendors, distributors, and partners.

d. In addition, we plan to distribute an executive summary and share project deliverables with the following networks:

1. National Farm to School Network

2. The Oregon Community Food Systems Network—Ecotrust is on the leadership team of this Network, comprised of over 40 organizations working collaboratively in Oregon working to advance local food systems issues.

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3. The Community Fisheries Network—Coordinated by Ecotrust; national network of 13 community-based commercial fisheries and fishing organizations working toward solutions to shared challenges
4. Tenants of the Redd on Salmon Street—Ecotrust owns this two-block campus in the heart of Portland, Oregon, which serves as a working hub for the local food economy and houses tenants doing aggregation, processing, and distribution of local food.
5. National Farm to Institution Metrics Working Group—30 members based in 20 states working at municipal, county, multi-county, state, regional, and national levels to measure and track the impact of the institutional market from producer to buyer.
6. Cascadia Foodshed Financing Project—Coalition of foundation funders and independent investors focused on food system reform in the Pacific Northwest
7. Sustainable Ag & Food System Funders—National association of food system reform foundations and funders
8. Partners at FoodCorps, a national initiative that provides Americorps service members to sites across the country to connect kids to healthy food in school, so they can lead healthier lives and reach their full potential.

**ii. When do you plan to publicize the results?**

- a. Our presentation at the National Farm to Cafeteria Conference, Proteins for a Healthy Planet: Innovative Strategies for Sourcing Better Meat and Plant-Based Foods, took place on April 26th, 2018. Attended by more than 60 enthusiastic stakeholders, we distributed hard copies of the whole hog guide and shared our new local proteins webpage.
- b. The project summary and webpage is up at: <https://ecotrust.org/project/local-proteins/>. An Ecotrust e-newsletter sharing the new webpage was sent to more than 11,000 recipients on April 27th, 2018. E-news and screenshot available upon request.
- c. NW Food Buyers' Alliance e-newsletter will be sent out to 336 stakeholders in early May 2018.
- d. The executive summary and project deliverables will also be shared with the listed partners above (under #7.,i.,d.) in Summer 2018.

*\*If you have publicized the results, please send any publicity information (brochures, announcements, newsletters, etc.) electronically along with this report. Non-electronic promotional items should be digitally photographed and emailed with this report (do not send the actual item).*

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**8. Have you collected any feedback from your community and additional stakeholders about your work?**

**i. If so, how did you collect the information?**

- a. We conducted check in calls with the seven foodservice buyers/chefs to update them and ask how we were doing throughout the project.
- b. We met with project advisors and collected their feedback directly.
- c. Surveys were distributed to buyers & vendors at each hosted event.
- d. An electronic survey at the end of the project was sent through the NW Food Buyers' Alliance e-newsletter to foodservice buyers and to suppliers/distributors.

**ii. What feedback was relayed (specific comments)?**

- a. Foodservice buyers were all satisfied with our support and direction. Several will continue to work with us on the implementation project. One piece of feedback shared by most, is that they would prefer to work through their current distributor, whenever possible, for procuring local proteins.
- b. Our advisors gave us specific feedback to include them more in planning project activities and events. We responded by including them more in planning and will actually co-manage the implementation project with Health Care Without Harm as a result!
- c. We received lots of helpful feedback via the surveys we distributed after events and also at the end of the project. Some highlights included:
  - 1. 68% of foodservice buyers/chefs said they want to continue receiving promotional emails highlighting the availability of local products. These promotional emails are a new strategy we experimented with and we weren't sure how they would be received, so this was helpful feedback and we will continue to do them.
  - 2. 88% of vendors said they would attend the Local Link vendor fair again to showcase products and makes connections with institutional foodservice staff.

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9. Budget Summary:

i. As part of the LFPP closeout procedures, you are required to submit the SF-425 (Final Federal Financial Report). Check here if you have completed the SF-425 and are submitting it with this report:  Yes

ii. Did the project generate any income?  Yes  No

a. If yes, \$ NA generated and how was it used to further the objectives of this project?

iii. In the table below include the total amount of federal funds spent during the grant performance period (Do not include matching or in-kind contributions):

Categories	Amount Approved in Budget	Actual Federal Expenditures (Federal Funds ONLY)
Personnel:	\$55,560.00	\$58,794.60
Fringe:	\$16,797.00	\$15,528.54
Contractual:	\$7,500.00	\$9,940.00
Equipment:	\$0.00	\$0.00
Travel:	\$2,428.00	\$192.60
Supplies:	\$0.00	\$237.01
Other:	\$0.00	\$0.00
Indirect Costs:	\$12,556.00	\$9,994.54
<b>TOTAL:</b>	<b>\$94,841.00</b>	<b>\$94,687.28</b>

iv. ONLY for LFPP recipients: Provide the amount of matching funds/in-kind contributions used during the grant performance period.

Categories	Match Approved in Budget	Actual Match Expenditures
Personnel:	\$19,495.75	\$ 24,199.86
Fringe:	\$5,891.25	\$ 7,088.18
Contractual:	\$0.00	\$0.00
Equipment:	\$0.00	\$0.00
Travel:	\$2,218.75	\$0.00
Supplies:	\$0.00	\$0.00
Other:	\$0.00	\$0.00
Indirect Costs:	\$4,008.25	\$0.00
<b>TOTAL:</b>	<b>\$31,164.00</b>	<b>\$31,288.04</b>

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**10. Lessons Learned:**

**i. Summarize any lessons learned. They should draw on positive experiences (e.g. good ideas that improved project efficiency or saved money) and negative experiences (e.g. what did not go well and what needs to be changed).**

a. Just a little boost to vendors can go a long way. Ecotrust helped grass-finished beef supplier Carman Ranch, by planning, hosting, and evaluating a sensory test of different burger blend prototypes. As mentioned earlier, as a result of this tasting, Carman Ranch was able to identify the preferred prototype (75% beef, 25% raw local mushrooms) and collect feedback from buyers on institutional purchasing considerations such as preferred format, packaging, delivery, and price sensitivity. Carman Ranch was thrilled with the results and after the tasting, they reported readiness to sell the 25% raw mushroom blend to institutions, starting immediately, and reported a purchasing agreement with one foodservice buyer to purchase their initial batch of 2,000 lbs. A full analysis of the sensory test is available as a separate report, upon request.

b. Buyers prefer to work through their current distributor, whenever possible, for procuring local proteins. The network of distributors that serve institutional buyers is less likely to carry local products. For example, in some cases buyers interested in purchasing products from smaller vendors highlighted in the protein promotional emails were not able to because these small-scale vendors only self-distribute products.

c. Small and midsize vendors have had trouble accessing broader distribution channels due to issues with certification, which can be costly, or due to the need to show adequate demand via previous sales before distributors will take them on (which, ironically, is why they want to sell through distributors, so that they can meet new demand).

d. Helping vendors to access broader supply chains is valuable. As noted earlier, we helped two participating vendors, Sea to Table and Wilder Land & Sea, to begin applying for their Bon Appetit Management Company certifications as part of this project. While they do not have the certification yet, if they are able to acquire them, they have noted that it will be really impactful as they will be able to reach a larger and dedicated audience, primarily of college/corporate foodservice.

e. Institutional purchasing relationships take time. For example, Carman Ranch is expected to have a boost in sales from their new blended burger line, but those results are not reflected in our results from this planning grant since the sales will occur after March 30, 2018. In addition, we heard from vendors like Sea to Table that they expect this planning grant to open new opportunities for them with institutions, but haven't yet brought those relationships to fruition. Sherwood School District shared that they are slowly taking the steps needed to purchase local proteins, but due to school regulations, they have not yet made new purchases.

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f. To benefit from local and regional market development, vendors require a cohort of committed institutional buyers. There is power in numbers and when we are able to bring together foodservice buyers from a diversity of sectors requiring a range of volumes, it helps vendors to assess institutional purchasing considerations and find the right fit for their products. We saw this at both our blended burger and fish demo events.

g. Forward contracting necessitates an investment in relationships and developing those relationships can be just as valuable as executing a contract. We read/heard time and time again that these contracts are most successful when they take place between trusted partners. In practice, this often means that these agreements remain handshake deals rather than being formalized as signed contracts. Forward contracts can be written agreements that are not legally binding but serve as a strong indicator of mutual respect and outline clear intentions to work together and contract in the future. For all these reasons, we found that forward contracting is still gaining traction as a viable strategy for institutional procurement of local foods.

**ii. If goals or outcome measures were not achieved, identify and share the lessons learned to help others expedite problem-solving:**

a. We exceeded most of our original targets. The two indicators where we did not hit the targets included in our original proposal were Outcome 2, Indicators 1. & 2 (even though, notably, we still saw an increase on both indicators). We believe there are a few reasons for this:

1. Our original targets were based on rough data at the time. Some of our vendor partners changed over the life of the project, making these original estimates somewhat off the mark. For example, we guesstimated an original customer count of 1 and an increase to 4 for a 300% change, but when we took a baseline for the project, we found an original count of 49 customers, with a total increase of 6, which, though bigger numerically than the original estimated total increase of 3, only equates to 12% since the denominator is much larger.

2. Because of the timing of the project, we divided our baseline and our project period into equal periods of 9 months (for the 18 month project). In retrospect, we should have probably asked for baseline data to cover 12-18 months prior to the beginning of the project to capture any early changes and also to account for seasonality. We saw some sales dip in the project period as measured and we believe some of that is likely due to seasonality differences in the availability of product. In the future, we would use data from similar time frames to account for seasonality.

3. Finally, one of our vendors saw a significant dip in local beef sales during the project period because one of their current customers saw a promotional email and asked for the discounted price. We had not thought to include a clause about promotions not being available to current

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customers with ongoing relationships, and in this case, it mattered a lot because that customer accounted for a large portion of the vendor's sales. This is something we will take into account for future promotions.

**iii. Describe any lessons learned in the administration of the project that might be helpful for others who would want to implement a similar project:**

- a. Find ways to include advisors in the early planning phases of the project and more regularly throughout the project. Although we were wary of being a burden to our advisors by asking them to meet often, partway through the project we actually learned that the NW Food Buyers' Alliance steering committee wanted to be included more and have more of a role shaping events and activities.
- b. Capture a baseline earlier and make sure baseline and project periods have the same time frames in terms of seasonality.
- c. Unless you have professional evaluators on staff, include support for hiring a contractor to help with project evaluation. We had to use match funds to support to pay for an evaluator, but it added immense value to the final project results and analysis.

**iv. Discuss if and how the result of this project can be adapted to other regions, communities, and/or agricultural systems.**

- a. The results of this project are meant to be adapted across the country:
  1. The whole hog model is outlined in both a hard copy and electronic guide, meant to be replicated by foodservice chefs across the country. This model could also be considered as a starting point for other regions to think through whole cow or other animal models.
  2. The Blended Burger Sensory Tasting event could easily be replicated by other partners. We have already been asked by one partner to share the survey we adapted for use in another state and are happy to share it with others.
  3. The Local and Underloved Fish Culinary Demo was captured on video and could be used by other partners and regions, either to train foodservice chefs, or to inspire the development of a similar training in a different setting.
  4. The forward contract research summary and template are meant to be used by any foodservice staff, ranchers, and other community partners who are looking to help ease the process of forward contract development by sharing guidelines and resources and by outlining considerations and content that parties may wish to include in a formal or informal agreement.

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**11. Future Work:**

**i. How will you continue the work of this project beyond this grant? In other words, how will you implement the results of your project's work to benefit future community goals and initiatives? Include information about community impact and outreach, anticipated increases in markets and/or sales, estimated number of jobs retained/created, and any other information you'd like to share about the future of your project.**

a. As already has been noted, Carman Ranch is expanding the production and marketing of the 25% mushroom blended burger product. They already have a customer for their first 2,000 lb minimum run and have told us that their goal is to work toward selling 4-6,000 lbs per week of mushroom blended burger!

b. A direct continuation of this work is the development of a 3-year implementation project with partners to continue various threads of the work, with a focus on bringing a local value-added fish product to institutional markets and working with additional local suppliers to increase the availability of blended burgers. This project will be submitted to USDA AMS as a 2018 LFPP Implementation Proposal.

c. While Carman Ranch is forging ahead with their blended product, we have heard from other local beef suppliers who are interested in experimenting with blended product development, so our implementation project will include product development and sensory testing with local products beyond mushrooms (e.g., lentils, sweet potatoes).

d. Schools have expressed an interest in development of a value-added fish product, either a fish cake blended with vegetables or a pre-cut (and possibly pre-seasoned and/or pre-cooked) product that can be scooped. Our two vendor partners are interested in exploring this product development as part of the implementation project.

e. As noted earlier, the Oregon Department of Agriculture connected us to Oregon State University Extension's Food Innovation Center, Seafood Lab, and Niche Meat Processors to support supply chain research, product development, and sensory testing as part of the implementation phase.

f. As part of the implementation phase, we plan to launch a social media campaign with the Whole Hog Toolkit to educate foodservice chefs and cooks throughout the region, to make it available at future NW Food Buyers' Alliance events, and to offer live trainings to key institutional buyers.

g. Finally, via the implementation project, we will also continue to explore solutions for and work out the kinks to making aggregation and distribution of local proteins work via the Redd on Salmon Street and other local distributors.

**ii. Do you have any recommendations for future activities and, if applicable, an outline of next steps or additional research that might advance the project goal?**

a. We do! Please see our 2018 LFPP Implementation Proposal for details.