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GOOD FOOD FOR ALL
AN ASSESSMENT
OF FOOD SYSTEM EFFORTS IN
THE CHESAPEAKE FOODSHED



INTRODUCTION

Funders, advocates, and other stakeholders invested in creating a better food system have an opportunity to capitalize on a growing and converging movement to build and scale an equitable, sustainable, and thriving regional food economy in the Chesapeake Bay watershed. Seizing this opportunity will require forging a common vision and set of action priorities among a wide range of actors across the region, including funders, producers, food entrepreneurs and advocates, environmentalists, public health advocates, social justice organizations, and many others. By assessing the current landscape of food system initiatives in the Chesapeake Bay watershed and identifying the most crucial gaps and challenges, this report will help the Washington Regional Food Funders, Town Creek Foundation, Kaiser Permanente, the Chesapeake Foodshed Network, and other food system stakeholders align their priorities strategically and direct resources to the greatest needs and most promising levers for strengthening the regional food system.

There are five fundamental, cross-cutting issues that those interested in building and scaling an equitable and sustainable food system in the Chesapeake Bay watershed must address to make greater progress.



1. Overcoming structural barriers to create a food system that is equitable for producers, consumers, and workers alike. An equitable food system ensures access to nutritious food for low-income consumers and fair prices and wages for producers and food system workers. Yet deep-rooted, systemic challenges, such as poverty and competition from large-scale, subsidized industrial food production make it difficult to build a local food economy that safeguards food access for low-income individuals while providing adequate economic benefits for producers and workers. Because of these larger structural barriers, market-based approaches may not adequately promote equity in the food system. Food funders, advocates, and practitioners should explore effective ways to subsidize local food initiatives through governmental or charitable funding or tiered pricing strategies. They can also build partnerships with leaders and organizations working to promote economic development, affordable housing, and job creation in poor rural and urban communities, since bringing new resources into these communities is critical to increasing their access to nutritious food.



2. Elevating the voice of disadvantaged communities in food system efforts. Food system advocates must deeply engage leaders and organizations from disadvantaged communities and communities of color to ensure that the voices of those most impacted by food security issues are helping to shape priorities for the regional food system. Their voices are also crucial to ensuring that food system efforts prioritize and implement the most effective approaches for expanding access to nutritious food for those most in need, and for developing the broader

power needed to create policy change and build a new food culture in the region that demands good food. The Chesapeake Foodshed Network and other food system advocates can elevate these voices by building partnerships with existing social justice organizations representing food system workers, communities of color, and poor communities in rural areas. Organizations like the Restaurant Opportunities Center United, Farmworker Support Committee, and CASA de Maryland have extensive reach into these constituencies.



3. Gathering more data on the current infrastructure and gaps in the supply chain, and enhancing coordination of regional food initiatives. There has been momentum in the development of food hubs, processing facilities, and other supply-chain infrastructure in the region. However, in order to maximize efficiencies and to ensure that these new initiatives are most strategically connecting supply to demand, funders should consider investing in research to identify the ripest market opportunities and supply-chain needs, and create platforms that enable investors, producers, food hubs, and other food entrepreneurs to communicate and coordinate efforts.



4. Opening and influencing mainstream, institutional markets. While the growth in community-supported agriculture initiatives, farmers markets, and other direct-to-consumer and alternative food system models in the region is encouraging, people continue to purchase the vast majority of their food in mainstream, institutional markets. Scaling the reach and impact of regional food system initiatives will require working with larger institutional purchasers such as supermarket chains, hospitals, schools, and general purchasing organizations, to place greater priority on sourcing food that is locally and sustainably produced. Funders and the network should explore a two-pronged approach to achieve this objective. They can support advocacy and public education campaigns to increase consumer demand for local food and to push public institutions, schools, and hospitals to adopt local procurement policies. In addition, given the very real financial pressures driving institutional purchasing decisions, they should also focus on expanding the region's supply-chain infrastructure so that local producers can achieve the economies of scale they need to better compete in institutional markets.



5. Strengthening the advocacy capacity of organizations engaged in food system work. Transforming the food system will require successful advocacy efforts to promote a culture that demands good food and to reform local, state, and federal food policies so that they better support smaller producers and incentivize the production of nutritious, local, and sustainably grown food. Food system advocates such as local food policy councils can benefit from additional resources, coalitional partners, skills, and training to develop broader political power.

ASSESSMENT GOALS AND METHODOLOGY

This report summarizes findings from a landscape analysis that Arabella Advisors conducted on current strategies and initiatives to strengthen the regional food system in the Chesapeake Bay watershed and the most significant gaps in those efforts. Funded with support from the Town Creek Foundation, Kaiser Permanente, and Washington Regional Food Funders,¹ a working group of Washington Regional Area Grantmakers, the analysis is intended to inform the efforts of funders, the Chesapeake Foodshed Network, and other leaders and organizations working to build a better food system in the region to develop a common vision and shared set of action priorities.

We structured our research and analysis around a triple-bottom-line framework, assessing food system efforts for their impact on promoting social equity, environmental sustainability, and economic opportunity across the region. While these categories provided the organizational framework for our research and report, we recognize that they are interrelated, and that many of the strategies and gaps we have identified in this report span more than one of these areas. For example, environmental pollution that disproportionately affects some populations is both an environmental and a social equity issue, and the working conditions of agricultural workers are a social equity concern as well as an economic one.

Our analysis and findings were also informed by the experience of Arabella's Good Food team. In dozens of food-related projects with philanthropists across the country, we have identified three essential elements to building a good food system: 1) a culture that demands good food, 2) an infrastructure that supplies good food to meet that demand, and 3) a policy environment that enables a good food system to take root. Building a better food system in the Chesapeake watershed region will require attention to and action on all three of those elements.

Stakeholder interviews provided the foundation for Arabella's findings. Arabella completed interviews with a diverse group of 29 stakeholders, including community leaders; agricultural producers; and environment, labor, and public-health experts. A complete list of interviewees is available in Appendix A. The assessment also incorporates stakeholder input from the Chesapeake Foodshed Network's January 2016 food system summit, which convened a diverse group of approximately 100 food system funders, thought leaders, advocates, and practitioners. Lastly, our findings draw from research reports focused on best practices and current and emerging initiatives in the Chesapeake Foodshed and other regional food networks. A bibliography of the resources that informed this report is included in Appendix B.

¹ In addition to Kaiser Permanente, the other funders from the Washington Regional Food Funders who supported this assessment include the Morris & Gwendolyn Cafritz Foundation, the Prince Charitable Trusts, and Northern Virginia Health Foundation.

PROMOTING SOCIAL EQUITY AND FOOD ACCESS

An equitable food system provides access to nutritious food to all residents, regardless of their race, background, or socioeconomic status, and fair prices and wages for producers and food system workers. An equitable food system also promotes health equity, since inequities in food access drive important racial disparities in health outcomes. For example, Latinos and African Americans are more likely to suffer from certain chronic diseases because they lack access to a healthy diet. In Baltimore, a city that is 63 percent African American, more than a third of residents qualify for the Supplemental Nutrition Assistance Program (SNAP), and African Americans in the city are more than twice as likely as white residents to be obese or to die of diabetes.² Promoting access to a healthy diet for low-income individuals is fundamental to addressing important racial inequities related to individual and community health.

CURRENT STRATEGIES AND INITIATIVES

Supplemental SNAP programs, food banks, and urban distribution initiatives. There are a number of initiatives in the region aimed at increasing access to nutritious food in disadvantaged communities by subsidizing costs for low-income consumers or bringing fresh, whole foods directly into poor neighborhoods. The region has a variety of supplemental SNAP programs that enable low-income individuals to purchase food at farmer's markets. For example, the Arcadia Center for Sustainable Food and Agriculture distributes fresh, local food in low-income, food-insecure neighborhoods in Washington, DC through its Mobile Market program, and it offers a donor-subsidized bonus bucks program that halves the cost for low-income residents. DC's Produce Plus Program, funded by the Department of Health, provides low-income residents with supplemental funds for purchases at farmers markets; DC Greens and DC Hunger Solutions, which co-convene the DC Farmers Market Collaborative, conduct outreach with District residents to spread the word about the program.

Food banks in the region have also taken steps to provide fresh, locally produced food to those in need. For example, Capital Area Food Bank (CAFB) launched a Fruits and Vegetables Fund with the support of local funders; last year, the food bank purchased 400,000 pounds of fresh produce from five local farms for distribution to 16 of its food assistance partners. CAFB has also partnered with Martha's Table to distribute fresh produce and other nutritious foods to those in need at local elementary schools and to provide cooking and nutrition education to children and their parents.

Several cities in the region, including Philadelphia, Baltimore, and Washington, DC, have created model initiatives to bring fresh food into inner-city corner stores. For example, the Philadelphia Healthy Corner Store Network includes more than 600 stores that have committed to offer their customers fruits, vegetables, and other nutritious foods. There are some innovative programs that have created alternative distribution net-

² Johns Hopkins Urban Health Institute. *Health Disparities in Baltimore City: Is Geography Destiny?* Johns Hopkins Urban Health Institute. Baltimore. 2012. http://urbanhealth.jhu.edu/media/reports/healthdis_baltimore.pdf.

works in poor neighborhoods, such as the Black Church Food Security Network, which distributes produce from Black Dirt Farm on the Eastern Shore through a network of black churches in Baltimore. In addition, urban gardens, such as those supported by the Delaware Center for Horticulture, bring fresh, local, nutritious food to low-income communities and help revitalize blighted neighborhoods. And Maryland's Fresh Food Financing Initiative, launched in 2015 with state funding, provides financing to businesses and nonprofits that offer healthy eating options in food deserts throughout the state.

Farm-to-school initiatives and school meal programs. Public schools are another important channel for increasing food access for low-income children. Farm-to-school and school meal programs can encourage healthy eating and bring fresh, locally produced food to children of all income levels. DC enacted a model program in 2010 with passage of the DC Healthy Schools Act, which aims to increase access to healthier diets and reduce the rates of overweight and obese youth in DC by improving the nutritional value of school meals, enhancing physical education and health education programs in the schools, and other measures. The program provides financial incentives to schools to source fresh, locally grown foods for their school meals, and supports school garden programs. Another important school meal initiative is the Community Eligibility Provision of the federal Healthy, Hunger-Free Kids Act of 2010, which provides funding for free school meals for school districts with high percentages of low-income children. In 2014, Somerset County became the first Maryland school district to offer free meals to all of its students through the program; Baltimore County followed in 2015, bringing free meals to more than 85,000 students at 186 "Hunger Free" Schools in Baltimore.³

Good food as preventative health. Another important strategy for promoting social equity in the food system involves engaging the health sector in initiatives to increase access to nutritious food for low-income individuals. For example, Unity Health Care, in partnership with DC Greens, Columbia Heights Community Foodworks, and Wholesome Wave, launched a produce prescription program in 2012. The program provides vouchers to low-income, high-risk individuals struggling with obesity or chronic disease to purchase fresh fruits and vegetables at farmers markets. Such programs are currently small in scope but have potential to be replicated or scaled. Kaiser Permanente, one of the region's largest health care providers, provides grants and leadership to support healthy eating initiatives and to increase food access across the region; it helped Baltimore hire its first food policy director in 2010. Kaiser has also sponsored farmers markets at its medical centers and across the mid-Atlantic region.

CHALLENGES AND GAPS

Considered together, the strategies and initiatives described above have elevated attention to food security issues in the region and made strides toward expanding access for the individuals they serve. They need to be expanded and scaled. At the same time, there are some notable gaps in current efforts to promote a more equitable food system.

³ Maryland Hunger Solutions. *Maryland Schools Eligible to Elect the Community Eligibility Provision 2015-2016 School Year*. 2015. Maryland Hunger Solutions. http://www.mdhungersolutions.org/pdf/cep_eligible_schools2015-2016.pdf.

Limitations in food access programs for low-income communities. Current programs to increase food security and access for low-income individuals aren't reaching important populations that are in need. Programs like SNAP are means-tested; those that fall just above the qualifying income levels are ineligible, despite the fact that many of them struggle financially and lack food security. Similarly, undocumented immigrants and many legal, recent immigrants are ineligible for publicly funded food access programs. In rural areas, lack of population density and limited transportation and public transit infrastructure can make it

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challenging to implement food access programs that reach all those in need. A number of rural food pantries are located in community centers, libraries, and churches, but they tend to have limited capacity and hours. And while food banks have taken some steps to provide locally produced, nutritious foods, stakeholders expressed concerns that the region's food banks cannot meet the demand of those in need, and that financial constraints can make it hard to source fresh, local food at a price that is equitable for farmers.

Stakeholders also report that ensuring equitable access to nutritious, local food is not always a priority for local food initiatives. Food hubs, for example, help local producers aggregate and find new markets for their products but are not always dedicated to ensuring that these products reach those in poor communities. One stakeholder who runs a food hub that does target low-income communities suggests that government does not focus enough attention on issues of access: “We are frustrated with the emphasis on government programs that link food and economic growth, because it leaves behind low-income communities.”

The inconsistent focus on food access can be attributed to at least two important factors, both discussed in the introduction to this report: 1) the underrepresentation of leaders and organizations from disadvantaged communities in food system initiatives, the voices of whom are needed to ensure that issues of access are addressed and prioritized; and 2) larger issues in the US economy and political environment that make it difficult to design programs that are economically beneficial for producers, workers, and low-income consumers alike without major public subsidies. It is challenging to make local, fresh food accessible to those in high-poverty, high-unemployment neighborhoods without addressing the underlying economic and political drivers of poverty and economic insecurity. And those challenges are exacerbated by federal food policies that make commercially produced food—which is often less nutritious—the cheapest available option for the poor.

Insufficient attention to workplace equity. A majority of food system workers, including farm workers and restaurant workers, fail to earn a living wage. As a result, the very workers who bring food into the community often cannot access it themselves. Restaurant workers, for example, experience poverty at double the rate of the national workforce as a whole.⁴ Many food system workers have also faced abuses such as wage theft, unsafe and unhealthy working conditions, or sexual harassment.

4 Restaurant Opportunities Centers United. *Picking up the NRA's Tab: The Public Cost of Low Wages in the Full-Service Restaurant Industry*. New York: Restaurant Opportunities Centers United, 2015. <http://rocunited.org/picking-up-the-nras-tab-the-public-cost-of-low-wages-in-the-restaurant-industry/>.

Yet according to one worker advocate, “Being progressive on sustainability doesn’t necessarily translate to workers’ rights.” Stakeholders report that workers can encounter abuses at large organic farms and at restaurants that serve sustainable food, just as they do at traditional commercial establishments. Bringing worker advocacy groups such as Restaurant Opportunities Centers United and the Farmworker Support Committee to the table with other food system advocates and stakeholders can help elevate attention to workplace equity issues and ensure that food hubs, farm-to-school programs, and other initiatives integrate commitments to promoting and upholding decent working conditions for food workers.

Opportunities to engage with the health care sector. Although access to nutritious food is a major health equity issue, and the high incidence of diet-related chronic disease is a main driver in rising health care costs, the health care sector is not fully using its resources to build healthier food systems. For example, according to a report from the Center for a Livable Future and the Union of Concerned Scientists, nonprofit hospitals in Maryland, which have millions of dollars in discretionary community benefits funding, are not currently using those funds to support food initiatives outside their campuses. These resources could be used to provide matching funds for supplemental SNAP programs and other initiatives to promote access to nutritious food in disadvantaged communities and to reduce health disparities. Maryland recently eliminated its fee-for-service hospital payment structure in favor of global annual budgeting, which could create greater incentives for hospitals to invest in community-based healthy eating initiatives as a way to reduce patient care costs.

Beyond hospitals’ community benefits funds, other health care providers have foundation and grant-making programs they could be using to support and engage in food access initiatives, but stakeholders report that few are currently doing so. A number of stakeholders also cited the need for doctors and other health care providers to increase their understanding of nutrition issues and their ability to educate patients about healthy eating. Lastly, health care organizations can be resistant to sourcing local food in their own procurement contracts. According to one public health expert whose work focuses on institutional food procurement, “It’s a misconception to think that a health care organization would put local food as a priority...the majority of hospitals hire a food service management company [and] the powers that make those contracts are looking at the bottom line.”

ADVANCING ENVIRONMENTAL SUSTAINABILITY

An environmentally sustainable food system supports healthy communities, land, and waterways. Stakeholders reported that the most significant regional environmental threat posed by the current food system is water pollution. The major source of water pollution is nutrient runoff, especially related to commercial poultry operations such as those on Maryland’s Eastern Shore. Water pollution impacts the quality of drinking water in the region, the health of river and bay ecosystems, and the health of our fisheries. In addition to water pollution, stakeholders cited two other important regional environmental concerns related to the food system: threats to fishing stocks due to past overharvesting and population growth; and food waste, which contributes to landfill and runoff and undermines soil quality.

While those working on sustainability issues have focused significant attention and resources on these regional environmental threats, there is a need for more data and research on the relationship between the regional food system and climate. Policymakers and planners need to factor projected changes in climate into planning efforts for the regional food system, including future climate impacts on arable land, water supplies, and fishing stocks. In addition, research can help the community better understand how a sustainable regional food system can mitigate climate impacts.

CURRENT STRATEGIES AND INITIATIVES

There are four primary strategies that stakeholders are currently implementing to promote environmental sustainability within the regional food system: pollution regulation and enforcement measures; government-based financial incentives and supports to encourage sustainable practices and support compliance with pollution regulations; innovative food recovery and waste diversion initiatives; and market-based programs aimed at incentivizing sustainable production methods.

Pollution regulation and enforcement measures. The Environmental Protection Agency's (EPA) Total Maximum Daily Load (TMDL) pollution reduction targets and other policies that limit water pollution are important levers for reducing waste disposal at industrial farms and increasing the environmental sustainability of the regional food system. One of the most significant pollution regulation measures in the region is the Chesapeake Clean Water Blueprint, a plan for reducing water pollution that emerged from the EPA's 2010 decision to set enforceable limits for nitrogen, phosphorus, and sediment pollution in the bay. Under the blueprint, states and localities in the region have developed plans for achieving the EPA's pollution reduction targets by 2025, and face consequences if they fail to meet incremental goals every two years.

Support for agriculture best management practices. Programs that provide farmers with financial incentives, training, and support help them transition to more sustainable practices and are critical for ensuring that local producers can comply with pollution regulations without facing undue economic burdens. For example, the Virginia Conservation Reserve Enhancement Program⁵ combines state and federal funding and tax credits, as well as private charitable funding, to help farmers create forest buffers to prevent erosion and pollution from entering waterways. The program has the potential to reduce annual nitrogen, phosphorus, and sediment pollution in Virginia waterways by more than 710,000 pounds, 114,000 pounds, and 62,000 tons, respectively.

Food recovery and waste diversion efforts. Composting and other food recovery programs promote environmental sustainability by reduc-

“It’s a misconception to think that a health care organization would put local food as a priority...the majority of hospitals hire a food service management company [and] the powers that make those contracts are looking at the bottom line.”

5 Virginia Department of Conservation and Recreation. *Virginia's Conservation Reserve Enhancement Program*. 2015. DCR. <http://www.dcr.virginia.gov/soil-and-water/crep>.

ing landfill use, minimizing runoff, improving soil quality, and sequestering carbon emissions. These initiatives can also generate additional revenue for farmers and bolster the regional economy. For example, the Institute for Local Self-Reliance's work suggests that composting could also support the creation of a significant number of new jobs. Programs that recover food that would otherwise be discarded and donate it to local food banks also help increase low-income individuals' access to healthy food.

There are a number of notable food recovery initiatives in the region. Chesapeake Compost works in Baltimore and has the capacity to process 180 tons of food scraps per week, selling compost at \$34 per cubic yard. Private companies like Compost Cab and Fat Worm offer compost pickup for a fee, and a number of community gardens and farmers markets accept compost from community members who bring their waste to designated sites. DC Central Kitchen recovered 807,534 pounds of food in 2014 and saved more than \$200,000 in food costs by using donated produce, and Peninsula Food Runners set up a communications system in Montgomery County to conduct real-time alerts for food waste that could be picked up and distributed by a volunteer network to food banks and other facilities. Outside of the region, California-based Imperfect Produce provides home delivery of affordable produce that would otherwise have turned into food waste due to cosmetic imperfections; the company provides a model that could potentially be replicated within the region.

New markets for sustainable agriculture and aquaculture producers. Market-based strategies can incentivize environmentally sustainable practices among the region's farmers, watermen, and aquaculture producers by opening access to new markets for sustainably produced goods at a fair price. Virginia-based Arcadia Center for Sustainable Food and Agriculture's Mobile Market food hub provides new markets for farmers who commit to using environmentally sustainable farming practices. Seafood Smart, a program of the National Aquarium in Baltimore, collaborates with local restaurants to promote the sourcing of seafood from fishermen and aquaculture producers who embrace responsible harvesting practices. There are also many national initiatives focused on expanding the market for sustainable seafood. For example, the Monterey Bay Aquarium has created Seafood Watch, a model program that educates consumers about sustainable seafood options through its website, guide, and app.

CHALLENGES AND GAPS

While the above strategies and initiatives have helped advance the regional food system's environmental sustainability, there are challenges and gaps that stakeholders must address to make greater progress.

Powerful political opposition. Opposition from large, politically influential commercial producers has hindered the implementation of important pollution control measures, such as the Chesapeake Clean Water Blueprint.⁶ Ultimately, progress on implementing more environmentally sustainable practices in the region will require cooperation from large commercial producers that dominate large areas of the region's food

⁶ Chesapeake Bay Foundation. *Reducing Phosphorus Pollution in Maryland*. 2015. <http://www.cbf.org/about-cbf/offices-operations/eastern-shore-maryland/the-issues/phosphorus-management-tool>.

system: Perdue, for example, sources chickens from more than 1,600 poultry farms in Maryland, and plays an outsized role in influencing the farming practices of many producers.⁷

Regulatory loopholes in pollution regulations. Important regulations such as the federal Clean Water Act—which authorized the creation of TMDL pollution limits—exempt the agricultural industry, leaving it to the states to take measures to curb agricultural pollution. These loopholes create uncertainties in the application and enforcement of pollution measures among agricultural producers and complicate efforts to create a more sustainable food system. The existence of such loopholes is itself also a result of the political influence of big agricultural producers.

Lack of a strong grassroots base and clear messaging about agricultural pollution. The influence of large commercial operations that are sometimes opposed to pollution regulation underscores the need for food system and environmental advocates to build stronger political power and advocacy capacity. Yet this in itself is another gap in the current food system landscape: environmental advocates lack a strong grassroots base and a clear and compelling message on agricultural pollution that can mobilize the public. Furthermore, stakeholders noted that tensions about environmental issues have sometimes generated distrust among environmental groups and small producers, hindering collaborative approaches to sustainability and the development of a more powerful and diverse base that is needed to build a stronger regional food system.

Need for sustained assistance for farmers and aquaculture producers in transitioning to more sustainable methods. As noted above, financial supports are important for helping producers to comply with pollution regulations and adopt more sustainable practices. In Virginia, for example, there are nearly 46,000 farms,⁸ and the average farm must spend tens of thousands of dollars taking measures to exclude livestock from waterways, according to one expert we interviewed. Securing sustained funding from state and local government is critical. According to a report from the Chesapeake Bay Foundation, Virginia is behind on its targets for animal waste management systems under the Chesapeake Clean Water Blueprint, and should provide long-term, stable sources of revenue for agriculture cost-share practices to get on track.⁹

Sustainability standards are unevenly integrated into food initiatives and do not directly address core environmental issues in the region such as water quality. Food initiatives aimed at strengthening the regional supply chain and creating new markets for smaller producers do not always actively promote environmentally sustainable practices. As one local food hub stakeholder observed, “I don’t know that any of the food hubs in this region has a hub-wide focus on sustainability. There are a few hubs that do have product lines, or at least label certain products with organic certification, naturally grown, humanely raised, etc. Those hubs

7 Kaye Leon. *Chicken Pollution Lawsuit Against Purdue Determines Future of the Chesapeake Bay*. Triple Pundit. 2012. <http://www.triplepundit.com/2012/10/poultry-pollution-lawsuit-perdue-chesapeake-bay/>.

8 Virginia Department of Agriculture and Consumer Services. *Agriculture Facts and Figures*. 2015. <http://www.vdacs.virginia.gov/markets-and-finance-agriculture-facts-and-figures.shtml>.

9 Chesapeake Bay Foundation. *Chesapeake Clean Water Blueprint: Virginia's Watershed Implementation Plan*. Chesapeake Bay Foundation. <http://www.cbf.org/how-we-save-the-bay/chesapeake-clean-water-blueprint/update-on-local-efforts/virginia>.

do not focus primarily on sustainable products, but tend to include those products as a premium service or item...The focus of most hubs tends to be on local producers.”

Moreover, commonly used production standards such as Organic and Good Agricultural Practices do not directly address core environmental sustainability issues for the Chesapeake Bay region, such as the priority issue of water quality.

Embedding sustainability standards within efforts to expand the regional supply chain, such as in food hubs, farm-to-school programs, or other initiatives, can help expand market-based incentives for more environmentally friendly production methods, and help ensure that the growth of the regional food economy mitigates rather than exacerbates environmental impacts. Given the limitations of current production standards, it may also be important to develop revised sustainability standards that are better tailored to the region’s specific environmental issues. Lastly, establishing a shared understanding among producers, distributors, retailers, and the public about what the production standards mean will equip institutional and individual purchasers to make informed choices that can drive more sustainable practices within the regional supply chain.

Lack of comprehensive food recovery systems adds to landfills, exacerbates CO₂ pollution, and undermines soil health. Despite some promising programs, waste diversion programs lack scale and are not well integrated with trash and recycling systems, and require significant effort on the part of those interested in composting. In Maryland, for example, less than 10 percent of food scraps were recycled in 2014, with the vast majority ending up in incinerators or landfills,¹⁰ where they ultimately convert to CO₂.

SCALING THE REGIONAL FOOD ECONOMY

A thriving regional food system is one that supplies a large portion of the food consumed in the region, provides expanding and profitable markets for producers, creates good jobs, and contributes to the broader health of the regional economy. There are a number of efforts in the Chesapeake foodshed focused on scaling the regional food economy. These include initiatives aimed at increasing direct-to-consumer sales, building institutional demand for local products, strengthening infrastructure to achieve economies of scale, and increasing access to affordable land.

CURRENT STRATEGIES AND INITIATIVES

Direct-to-consumer sales. Direct farm-to-consumer sales provide an important income source for many small farmers. Many such initiatives have emerged in the region in recent years. For example, the “Buy Fresh, Buy Local” program helps consumers find local products and connects consumers to local producers

¹⁰ Maryland Department of the Environment. *Organics Division and Composting*. 2015. Division of Land Management and Administration. <http://www.mde.state.md.us/programs/Land/RecyclingandOperationsprogram/SpecialProjects/Pages/Programs/LandPrograms/Recycling/specialprojects/composting.aspx>.

through websites, social media, and direct mail campaigns. There are at least 11 chapters in the foodshed. Community supported agriculture projects, in which consumers pay at the beginning of the season to pick up assorted produce from a local farm each week, have grown in popularity, and farmers markets have also been expanding rapidly. USDA data indicate there are now nearly 100 CSAs and 800 farmers markets across Delaware, Pennsylvania, Maryland, Virginia, and Washington, DC.¹¹ A variety of businesses have also emerged to meet the growing demand for local food in the region. Startups like 4P Foods, From the Farmer, Hometown Harvest, and Washington Green Grocer allow consumers to order local foods to be delivered to their homes, offering more flexibility than traditional CSA models.

Institutional procurement programs. Initiatives to increase institutional demand by encouraging institutional buyers to source from local producers are a promising strategy for expanding the market for local, sustainably produced food. There are a number of model institutional purchasing programs in the region. DC Central Kitchen has contracts to provide food in 10 public and private schools in Washington, DC, and has invested more than \$153,000 in local farms in 2014. The University of Maryland Dining Services, which has an annual budget of more than \$50 million, developed a sustainable food action plan in 2012, and has increased the percentage of sustainable food served on campus from 10 to 20 percent.¹² John Hopkins University has also made a commitment to purchase at least 35 percent of its food from local, sustainable, and fairly traded sources by 2020.

Development of supply chain infrastructure. Initiatives that help smaller producers coordinate and build economies of scale in aggregation, processing, and transportation are critical for enabling them to access and compete in a broader set of markets. According to USDA data, there are at least 25 existing or emerging food hubs in the region that are helping farmers aggregate and distribute their products to restaurants, retail stores, schools, hospitals, and other buyers.¹³ Some food hubs are connecting producers to large-scale markets. For example, Blue Ridge Produce, a Virginia-based food hub, has established partnerships with Coastal Sunbelt Produce and Whole Foods, two mainstream distributors. Initiatives like these that link new, alternative supply chain infrastructure to established systems can be particularly effective because they allow small producers to access the larger markets where most food purchases are made.

“We know that there is increasing demand for locally produced food, but what are the unique crops and products that producers should be supplying to meet that demand? We don’t know. We need market research to understand the potential economic opportunities.”

11 USDA. *Local Food Directories: National Farmers Market Directory*. 2016. <http://www.ams.usda.gov/local-food-directories/farmersmarkets> and USDA. *Local Food Directories: National Community Supported Agriculture (CSA) Directory*. 2016. <http://www.ams.usda.gov/local-food-directories/csas>.

12 UMD Dining services defines sustainable food as local (grown or processed within 250 miles of the campus), fair trade, humane, and ecologically sound.

13 USDA. *Local Food Directories: Food Hub Directory*. 2016. <http://www.ams.usda.gov/local-food-directories/foodhubs>.

“The biggest challenge for institutions is the price. You have a lot of people who talk the talk, but they don’t want to pay an extra nickel. Everyone wants the story, but the big institutional systems work under a bid system.”

In addition to food hubs, a variety of processing facilities have emerged in the region, including Virginia Food Works, a local cannery facility, and ProFish, which sources sustainable seafood to more than 2,500 accounts from its 15,000-square-foot warehouse in Washington, DC. Beyond physical infrastructure, development of “soft infrastructure” that helps foster connections and relationships among stakeholders is also important for strengthening the supply chain. For example, the Metropolitan Washington Council of Governments has received support from the USDA and local funders to hire a value chain coordinator, aimed at helping smaller producers build relationships with relevant stakeholders throughout the supply chain who they need to process, distribute, and sell their goods.

Programs to make land accessible. Across the region, there are a variety of initiatives aimed at helping farmers gain access to affordable land.

Cities such as Baltimore and Washington, DC have created programs to provide tax breaks to urban farmers and to encourage conversion of city-owned land into urban gardens and farms. There are also programs targeted to farmers in rural areas. For example, in Virginia, the Piedmont Environmental Council educates farmers about opportunities for affordable leasing arrangements. Future Harvest Chesapeake Alliance for Sustainable Agriculture’s Field School Beginner Farmer Training Program helps next generation farmers across the region find land to start their own farms, access grants and loans, and build relationships with mentor farmers.

CHALLENGES AND GAPS

While these and other strategies and initiatives have made progress in advancing economic opportunity for producers in the region, a number of gaps and challenges remain.

Need for coordination and data in supply chain initiatives. Several stakeholders indicated that there is a need for greater coordination of and data for supply chain initiatives to maximize efficiencies and impact and avoid redundancies. For example, better coordination and communications could help producers optimize efficiencies in transportation. Currently, local producers may be missing opportunities to cost-effectively transport their goods to market through existing transit systems, such as food bank shipments. Stakeholders also expressed concern about creating too many food hubs and oversaturating the market for certain products. Even in areas where there is little penetration of local food hubs, stakeholders cited the need for additional data and market research. As one stakeholder in Delaware put it, “We know that there is increasing demand for locally produced food, but what are the unique crops and products that producers should be supplying to meet that demand? We don’t know. We need market research to understand the potential economic opportunities.”

Need for community-supported fisheries (CSFs) in the region. Community-supported fisheries and direct, boat-to-consumer initiatives can provide an important income source for local watermen and a direct connection to local fisheries for consumers. However, while CSAs connecting farmers to consumers have

expanded rapidly, similar initiatives to connect consumers directly to fishermen have been much slower to develop in this region than in other areas of the country, such as New England. Localcatch.org does not list any CSFs in the Chesapeake Bay area.

Insufficient institutional demand. Despite efforts to increase institutional demand, large purchasers like supermarket chains, schools, and hospitals have strict bottom lines and often won't pay prices farmers need for sustainably produced goods. Some of these organizations rely on group purchasing organizations to source food, which scan national and international markets to find the lowest costs for their members. In addition to concerns about the cost of locally produced goods, many institutional buyers are constrained in their ability to work with individual small producers, as they need guaranteed delivery of large quantities of goods.

"The biggest challenge for institutions is the price," said one local producer who works with larger purchasers. "You have a lot of people who talk the talk, but they don't want to pay an extra nickel. Everyone wants the story, but the big institutional systems work under a bid system." Since institutional buyers comprise the vast majority of the market, getting more institutional purchasers to source local, sustainably produced food is an important strategy for scaling the regional food economy.

Continued barriers to affordable or accessible land. Despite the presence of some tax incentives and other programs to assist farmers, access to affordable land remains a major barrier to scaling the regional supply chain. City-owned land is often encumbered by red tape, or consists of brownfield sites requiring environmental clean-up. Suburban and rural land is often too expensive for farmers to purchase and build profitable businesses. Interviewees indicated that many farmers leave the region for areas where farmland is cheaper. Leases pose additional challenges, as farmers are often unwilling to invest in longer-term infrastructure like fencing when they are not certain how long they will be able to lease the land. With the current population of farmers in the region aging, developing strategies to expand the affordability and accessibility of land access is particularly crucial for supporting the next generation of young farmers who can sustain the regional agricultural economy.

Regulatory barriers to scaling regional food production and distribution. Lack of consistency in food policies and regulations across the region's multiple political jurisdictions, combined with federal food policies that are often tailored to the needs of large producers, have resulted in regulatory barriers to scaling regional production. For example, in order to sell meat across state lines, it must be processed in a USDA-inspected facility; such facilities are expensive for smaller-scale producers, limiting their ability to access wider distribution. Local regulations can also hinder the region's food entrepreneurs. For instance, licensing requirements and zoning regulations for food vendors differ across jurisdictions, posing challenges for small businesses seeking to operate in multiple locations.

RECOMMENDATIONS

The following are preliminary recommendations for how to address the critical gaps and challenges in the landscape of good food efforts and to accelerate progress toward building a more equitable, sustainable, and thriving regional food system. They represent a launching point for discussion in the work of Town Creek Foundation, Kaiser Permanente, the Washington Regional Food Funders, the Chesapeake Foodshed Network, and other food system stakeholders' ongoing efforts to develop a shared vision for the food system. They are intended to catalyze further conversations, goal-setting, and—ultimately—aligned action within the region.



Attract new investment capital to support business incubation, land acquisition, and supply-chain infrastructure development for the food system. Building the infrastructure needed for producers to effectively engage and partner with institutional and mainstream markets and scale the regional food economy requires capital. Based on Arabella's national landscaping, there is growing interest among a variety of investors in the good food supply chain, including early-stage venture capital firms that are investing in retail businesses that offer healthy food; large institutional foundations such as the MacArthur and Rockefeller foundations that are pursuing place-based investing strategies or investments in a particular area of the food system, such as waste spoilage; and smaller foundations and individual donors who are supporting food system work through their grant making or program-related investments. The White House and USDA have also shown a growing interest in supporting investment initiatives related to good food systems. Funders and local governments in the Chesapeake foodshed can help catalyze private investment in the regional food supply chain by providing seed and matching funds for early-stage enterprises and pilot initiatives that have the potential to be scaled, as well as by supporting further research into the current investment opportunities and gaps in the region.



Target schools and health care organizations for increased engagement in regional food initiatives. Changing the way that large, institutional purchasers source their food is an important strategy for scaling the regional food economy and promoting sustainability and equity. Schools and health care institutions present riper targets for such efforts as they are potentially more receptive to public influence, and have the resources and scale to reach a large portion of the region's population. Local school systems are accountable to elected school boards and other local public officials and are therefore more responsive to public action. Hospitals rely on a variety of public funds that carry specific mandates, such as their community benefits funds, and they, along with other health care providers and insurers, have a financial interest in preventing diet-related health conditions. In addition to implementing local procurement programs, both types of institutions can also play a larger role in the movement to strengthen the regional food system. For example, schools can create more education programs to increase future generations' understanding of the food system and its impacts on communities, health, and the environment; and health care institutions can do more to integrate healthy eating as a core component of their preventative health practices.

For these reasons, funders and advocates should consider investing resources in advocacy strategies that target these institutions and have potential to be replicated across the region. At the same time, funders, policymakers, and food entrepreneurs should explore ways to address the significant economic drivers that inhibit the ability of these and other large-scale purchasers from sourcing locally by expanding regional supply chain infrastructure that will enable local producers to build economies of scale and more effectively compete in institutional markets.



Strengthen the advocacy capacity of food system stakeholders and engage more leaders and organizations representing marginalized communities. Transforming the food system will require successful policy change efforts across a range of issues. Food policy councils that have emerged throughout the region are a natural base for advocacy efforts, but not all of them are focused on policy work. Funders can help build their advocacy capacity by providing funds to support dedicated staff members and resources for advocacy training. Food system advocates can also work to build partnerships with existing social justice organizations that have strong grassroots bases and established political power, and that represent the constituencies most impacted by food equity issues. As a way to more effectively develop such partnerships, funders and food system advocates should explore the potential for developing messaging and campaigns that link food to issues that resonate more broadly and deeply in diverse communities, such as issues related to jobs, affordable housing, neighborhood revitalization, and public safety.



Increase statewide and regional coordination. Regional coordination is important for advancing successful policy advocacy and optimizing the development of critical supply chain infrastructure in the region. Regional coordination of advocacy efforts can help harmonize policies across multiple jurisdictions and eliminate barriers to scaling the regional food economy. Furthermore, advocates and stakeholders will need to organize significant statewide and regional power in order to achieve the most far-reaching impacts on state and federal policies. In addition, investments on the part of funders and businesses in market research and data collection on the regional supply chain—along with a commitment to sharing the information broadly—can help regional food initiatives maximize efficiencies. Funders, too, can optimize the impact of their grant making and avoid duplication by coordinating and aligning philanthropic strategies focused on the regional food system.

To ensure that market-based, philanthropic and advocacy initiatives maximize their effectiveness, funders and food system leaders should create platforms for ongoing engagement, communication, and coordination across the entire Chesapeake foodshed region. The Chesapeake Foodshed Network is a critical vehicle for convening such communication and coordination.

CONCLUSION

Town Creek Foundation, Washington Regional Food Funders, Kaiser Permanente, and the Chesapeake Foodshed Network can build on the analysis and recommendations in this report by convening stakeholders across the region to develop a common vision for the food system and a set of shared action priorities to guide funders, policymakers, advocates, and food system entrepreneurs and practitioners. Fostering a powerful and cohesive movement to change the region's food system for the better can have tremendous, cross-cutting impacts in improving public health, strengthening the economy, safeguarding the environment, and building more equitable communities. In this way, good food can be a driving force in the effort to create better and stronger communities throughout our region.

APPENDIX A – INTERVIEW LIST

NAME	TITLE	ORGANIZATION
Alexandra Ashbrook	Director of Special Projects and Initiatives	Food Research and Action Center
Kevin Atticks	Founder and CEO	Grow and Fortify
Leonard Berman	Senior Program Officer	Prince Charitable Trusts
Kara Blankner	Program Officer	The Morris & Gwendolyn Cafritz Foundation
Mike Brannon	Vice President	Old Line Custom Meat Company
Reverend Heber Brown III	Founder	Black Church Food Security Network
Amanda Behrens Buczynski	Senior Program Officer, Maryland Food System Mapping Project	Johns Hopkins Center for a Livable Future
Nelson Carrasquillo	General Coordinator	El Comité De Apoyo a los Trabajadores Agrícolas (CATA-The Farmworkers' Support Committee)
Amy Crone	Executive Director	Maryland Farmers Market Association
Sydney Daigle	Program Coordinator	Prince George's County Food Equity Council
Aleya Fraser	Co-founder	Black Dirt Farm
Pamela Hess	Executive Director	Arcadia Center for Sustainable Food and Agriculture
Heather Iliff	President and CEO	Maryland Nonprofits
Lauren Jacobs	National Organizing Director	Restaurant Opportunities Centers United
Ariel Jacobson	National Development and Communications Director	Restaurant Opportunities Centers United
Evelyn Kelly	Senior Program Manager	Institute for Public Health Innovation
Vikram Krishnamurthy	Executive Director	Delaware Center for Horticulture
Dena Leibman	Executive Director	Future Harvest Chesapeake Alliance for Sustainable Agriculture
Tom McDougall	Founder	4P Foods
Chris Miller	President	Piedmont Environmental Council
Mardell Moffett	Associate Director	The Morris & Gwendolyn Cafritz Foundation
Matt Mulder	Director of Operations	Arcadia Center for Sustainable Food and Agriculture
Gina Navarro	Program Manager, Food and Community Health	Center for Integrative Medicine at the University of Maryland School of Medicine
Kristin Pauly	Former Managing Director	Prince Charitable Trusts
Brenda Platt	Co-Director	Institute for Local Self-Reliance
Kennard Ray	National Policy Director	Restaurant Opportunities Centers United
Neoma Rohman	Director	Mid-Shore Food System Coalition
TJ Tate	Director, Sustainable Seafood Program	National Aquarium
Amy Verbofsky	Research Analyst	Delaware Valley Regional Planning Commission

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