



Institutional Local Food

Growing Forward: A Procurement Plan

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Appendices

The following support documents are provided separately from the main report.

- A. Thunder Bay Local Food Model Baseline Data and Stakeholder Issues 2015
- B. Institutional Local Food Procurement – A field guide for managers and cooks. 2014
- C. Institutional Local Food Procurement – Advanced local food procurement guide. 2014
- D. City of Thunder Bay Municipal Food Procurement Team Terms of Reference, 2015
- E. Thunder Bay Food Availability Chart, 2015
- F. Agri-Food Funding Programs

1.0 Introduction

The Thunder Bay Local Food Procurement Model project is part of a province-wide initiative to leverage \$750 million dollar buying power of the public sector to support the development of sustainable local food systems. Guided by the Local Food Act, this initiative provides the foundation for a strategic shift in municipal procurement practices to accommodate greater volumes of raw food purchases sourced from Northwestern Ontario and Ontario. Implementation of the model will prepare the seven municipally administered broader public sector institutions to set and achieve local food procurement goals and targets as they are established by the province.

Meaningful and effective local food procurement plans add value to public sector spending in a way that exceeds cost-effective quality purchasing without compromising prudent fiscal responsibilities. Such *strategic spending* can have a net-positive impact on the community and the organization by:

- Contributing to community environmental enhancement; sustainability plans and internal “greening” efforts;
- Supporting economic development endeavours to build and expand local businesses;
- Supporting small and medium sized enterprises (SMEs) as they compete with large multinationals in an increasingly globalized food economy;
- Stimulating growth, innovation, and competitiveness within the local and regional agriculture and food processing sectors;
- Improving the well-being of institutional food service staff;
- Furthering the municipality’s reputation as a leader in food system planning in the province;
- Improving the quality of institutional food service; and
- Improving the overall healthfulness and quality of life for long-term care residents and day care children.

The Local Food Procurement Model proposed in this report is built upon the coordination of a local food supply chain across the seven partner institutions through the Supply Management Division. By coordinating purchases, municipal procurement and food service staff will be able to:

- Streamline procurement practices;
- Establish benchmarks and set realistic targets for local food procurement;
- Develop and implement an effective shared local food tracking and measurement tool;
- Coordinate food quality specifications and service assurances, and food safety requirements;

- Communicate more effectively and consistently with local distributors and suppliers;
- Collaborate to explore new products and suppliers;
- Share resources, information and recipes that enhance local food use;
- Develop strategies to reduce food waste;
- Leverage responsibilities to meet local food targets; and
- Support a culture of sustainable purchasing within the institutions.

1.1 Report Structure

Section 2 of this report provides an overview of the research that was conducted and the findings (Appendix A), the development of two field guides that were informed by the findings (Appendix B and C) and a two day local food purchasing workshop held in November 2014.

Section 3 provides a summary of the challenges that the institutional partners experience or anticipate in their local food endeavours. Each of the challenges are linked to specific stages of the procurement process (e.g. identifying local food, buying local food, quality and service guarantees, tracking local food, measuring change, and reporting change).

Section 4 introduces the Thunder Bay Local Food Procurement Model. The model is designed to guide institutional food service providers through the process of defining a shared vision and plan for institutional local food for the City of Thunder Bay. The model is designed specifically for the institutions that are administered directly by the City of Thunder Bay. It contains within it, however, insight, techniques, tools and resources that may be useful for other institutions and municipalities in Northwestern Ontario.

Section 5 features a list of suggested procurement practices to be explored by the City of Thunder Bay and the institutions that are administered directly by the City. These suggestions are adapted and expanded ideas from the field guides (Appendix B and C).

The final section of the report explores what the City of Thunder Bay and other stakeholders can do to build a vibrant and sustainable local food system.

2.0 Research Overview and Findings

The Corporation of the City of Thunder Bay is an advocate for sustainable food systems built upon a vibrant and productive local agricultural economy. The city is a leader in food systems planning in the province, having adopted the Thunder Bay Food Charter, the Community Environmental Action Plan, a Community Garden Policy and supporting the Thunder Bay and Area Food Strategy. Thunder Bay City Council has also adopted a Sustainable Ethical Environmental Purchasing Policy and the Supply Management division is now a recognized leader in strategic local food procurement practices.

One of the long-term goals enshrined within the City of Thunder Bay Food Strategy is to support a shift towards a food service model that prioritizes local food within the broader public sector (BPS) procurement. The intent is to leverage public spending on local food to maximize the benefit to the community and increase customer satisfaction within the seven municipally administered childcare centres and long-term care (LTC) facilities.¹ The development of a local food procurement model for broader public sector institutions was determined to be the best way to achieve this shift.

The research project was divided into three phases. The first phase established baseline data on food procurement, explored obstacles and opportunities for local food purchasing, and identified strategies that would help consolidate a model for local food procurement that would work for each of the seven institutions. The second phase of the research focused on creating resources for managers and kitchen staff to use in order to procure more local food. During the second phase, researchers liaised between food suppliers and buyers to facilitate mutual understanding, and identify key needs and assurances for both parties. The third phase of the research, presented here, involved supporting the creation and implementation of a local food purchasing model to be used by the City of Thunder Bay partner institutions. A terms of reference (ToR) for a municipal food procurement committee, developed in collaboration with the Supply Management Division, provides the foundation of the food procurement model. This report also includes a series of recommendations for operational changes and strategic direction that the municipality and its food system partners can explore to further advance broader public sector local food procurement, and strengthen the regional food and agricultural economies.

¹ At the time this study was initiated the City was managing the following seven institutions: Algoma Child Care Centre, Ogden Child Care Centre, Grace Remus Child Care Centre, Woodcrest Child Care Centre, Pioneer Ridge Home for the Aged, Dawson Court Home for the Aged, and Grandview Lodge Home for the Aged. Dawson Court and Grandview Lodge are scheduled to close in late 2015. The City of Thunder Bay is working with St. Joseph's Care Group during the transition process to assist those residents who wish to transfer to the Hogarth Riverview Manor Expansion (opening late 2015).

2.1 Preliminary Research

Two key data collection tools were developed to establish baseline data on procurement practices and local food spending volumes for each of the seven institutions—an electronic survey and a key informant interview protocol to be completed by management and core food and nutrition services staff. The information contributed to a detailed assessment of current NW Ontario and Ontario food purchases, standard procurement practices, and an inventory of kitchen equipment. The institutional participants also contributed insight on specific opportunities and challenges they face (or anticipate) when procuring local food products.

In order to clarify municipal procurement practices and further understand local market dynamics, a series of guided informal interviews were conducted with distributors, primary producers and city staff. Producers were asked to describe their experiences selling to the broader public sector, and what they perceived to be opportunities or barriers to accessing the institutional market. Distributors provided insight on where they saw opportunities to link institutional buyers with local product, and how supply chains could be developed or modified to support increased use of locally grown produce and proteins by the public sector. The manager of Supply Management for the City of Thunder Bay was consulted regularly to determine what role the department was willing or able to play in facilitating and monitoring the increased use of local food by the seven partner institutions.

2.2 Research Findings

Combined, the seven institutions serve nearly 3,000 meals and snacks each day and have an annual food procurement budget of approximately \$1.5 million. Each of the facilities' kitchens are well equipped to use whole, raw ingredients to prepare meals from scratch, however cooking space, and especially storage space is at a premium in the childcare settings.

The managers of the institutions generally have a strong desire to support the local Thunder Bay economy through their procurement practices by sourcing local food from community based vendors, however food cost and safety values trumped local most of the time. Price, they say, is paramount.

Fresh local food is perceived to be fresher, of higher quality, more trustworthy and better for the environment compared to processed and imported foods. Local food is also commonly considered by institutional managers to be much more expensive than comparable products offered by mainline distributors (namely Sysco) and those items that are discounted through membership with the HealthPro Group Purchasing Organization (GPO). (In Thunder Bay the

HealthPro volume discounts are available through Sysco and Loudon Bros.²⁾ Participants cited the *perceived* high cost of local as the main reason they have been unable to source local alternatives to items usually purchased through the mainline distribution network.

Conversations about local food tended to highlight personal values such as healthfulness, community, and sustainability as reasons for preferring fresh and local against the processed or imported alternative. It is evident that the enthusiasm for purchasing local food among key institutional management and staff is high, however this proclivity towards local is reflected more often by personal or domestic consumption decisions and is not extended to institutional procurement practices—although there are notable exceptions.³ If items commonly purchased through Sysco can be sourced locally at a similar cost, with food safety and service assurances, managers would happily make the switch.

The main challenge, in this case, is sourcing. Sourcing local requires spending time with food distributors and producers to ensure that the price, quality and service requirements are met. Knowledge of the local products that are available *and permissible* is relatively low among institutional managers and kitchen staff. More local food would be purchased if managers knew what was available, were confident that new vendors have been properly vetted by the Supply Management division, and that local food purchases did not violate any contractual agreements with the GPO. It is important to note that the managers who consistently procure higher volumes of local food have taken the time to source these items independently, working off the side of their desks. This is not unique among BPS institutions from across the province; higher local food procurement values have often been achieved through the personal volition of individual staff members.⁴

2.3 Local Food Procurement Field Guides

Two resource guides were created to respond to the early research findings, described above and in the preliminary report (Appendix A). The first resource guide is tailored to the needs of institutional food services management and staff, while second resource is directed to an audience more likely to be dealing with policy, regulation and processes that extend beyond the day-to-day operations of the kitchen.

The Field Guide for Managers and Cooks (Appendix B) is built around three basic phases of local food procurement: planning, implementation and

² See Appendix C: Advanced Local Food Procurement Guide for more information about HealthPro membership.

³ For more information on the procurement practices of the individual institutions, please refer to the Preliminary Report, Appendix A.

⁴ Local food procurement projects at institutions across the province have also been supported by partnerships with organizations dedicated to the cause, and through special project funding provided by the Greenbelt Fund however the participation of individual champions remains one of the major keys to success.

evaluation. It is intended to respond to the procurement needs of individual staff members, and to meet them where they are at. It provides a series of suggestions or strategies that they may or may not already be using in their institutions in order to better prepare them for local food procurement targets. The guide takes readers through three basic stages of local food procurement: planning, implementation, and evaluation. Each of the phases presents comprehensive “how-to” instructions on planning menus around seasonal availability, engaging with suppliers to encourage them to carry more local product, and techniques to monitor or audit the volume of local food that has been purchased over the course of the year.

One of the most significant barriers to local food purchasing among the partner institutions is the lack of knowledge about what foods are produced locally, and whether or not they are allowed to buy them. To address these needs, the resource includes a “living” local food purchase resource that points food and nutrition service managers, cooks, and storekeepers to businesses and farms that can provide wholesale volumes of specific local food items that meet institutional specifications. This resource is a snapshot of how an institutional buyers’ guide could be applied in the region. (Suggestions on how the municipality and local food stakeholders can maintain this resource are shared below.)

Some institutional managers were not clear on the rules laid out by the Supply Management Division governing food purchases. Several managers spoke to contractual obligations with HealthPro GPO (rebates are applied through Sysco and Loudon Bros.) and the lack of certainty about whether or not they were *allowed* to purchase local food from other vendors as obstacles to procuring more local. Concerns about food safety certification and quality and service assurances were also cited as potential barriers.

Operational procedures were not universally understood, and in order to move forward in developing a local food procurement model, the by-laws and procurement practices (many of which were unwritten) had to be spelled out more clearly. This need led to the creation of the Advanced Local Food Procurement Guide (Appendix C), which tackles broader issues such as dispelling the myth that national and international regulations are obstacles to local food procurement. The advanced guide also explores the municipal food procurement practices and policies, specific to Thunder Bay, that can support leveraging local food purchases in support of local economic and social improvement. It also provides suggestions on how the municipality can coordinate the role of the supply management division to support the local food procurement efforts in each of the seven city-run institutions.

2.4 Implementation Workshops

Two local food purchasing workshops were held in November 2014. The first workshop, held on November 19, 2014 was designed to facilitate the

implementation of local food procurement practices among partnering institutions. The workshop introduced the resources contained in the two field guides mentioned above, and solicited input on how these resources could be used and improved upon. The workshop also provided an opportunity for institutional staff to share their current approaches to procuring local food, and related success and challenges. The workshop provided important feedback on the utility of the resources, and contributed to identifying and confirming the key information elements that need to be included in order for the local food procurement model to be effective.

The second workshop, held the following morning, was open to a wider demographic of food system stakeholders. Participants included representatives from other broader public sector institutions in the Thunder Bay region, several farmers, local distributors, food project coordinators and city staff. The purpose of the second workshop was to bring the four target audiences together to educate each other about what their specific needs and assurances are in order to be able better work together to advance institutional local food procurement.

The second workshop served as an opportunity to foster dialogue and information sharing between the target groups and build stronger, closer working relationships. Breakout groups provided an opportunity for each stakeholder to discuss what they needed from their partners (knowledge, certification, service delivery guarantees, etc.) in order to better their business relationships. The breakout groups opened up into a general forum where those present shared their opinions on how the food system should be modified to open up more opportunity for local food procurement. The participants also discussed what the municipality and other agencies could do to build local production and processing capacity to meet the growing institutional demand.

One of the most important outcomes of the two-day workshop sessions was the expressed commitment of the manager of the Supply Management Division for the City of Thunder Bay to lead a local food procurement committee on behalf of the seven institutions. The idea for the committee stemmed from some of the strategic activities outlined in the two resource guides. The local food procurement committee is described in greater detail in the Planning and Implementation Strategies section below.

3.0 The Local Food Procurement Challenge

Procuring local food for institutional food service sounds relatively straight forward—buyers identify local-Ontario produce, proteins and ready-to-serve, prepared food → make arrangements with distributors or directly with producers and processors to purchase preferred local food items → buy the food → have it delivered → prepare it → serve it → track it → measure change → and report it.

Unfortunately, navigating the BPS food supply chain is not that easy—yet. There are obstacles to be cleared, hurdles to jump, and puzzles to solve every step of the way. The Preliminary Report (Appendix A) provides a broad overview of the challenges that the institutional partners met, or anticipated, on their local food endeavours, however several are worth highlighting again here, as the proposed model below serves to address them. Each of the challenges are tied to specific stages of the procurement process, described above.

3.1 Challenge: Identifying Local

- The word “local” means different things to different people: 100km radius, Northwestern Ontario, Thunder Bay Region, Province of Ontario. For the purpose of this project, we defined local as any food produced Northwestern Ontario, and the Province of Ontario. A definition of the parameters of Product of Ontario as laid out by OMAFRA can be found in the field guides.
- Purchasers typically do not have information regarding an item’s provenance at point of purchase, even when the orders are placed online. Identifying a product’s origin often happens after the fact. Storeroom audits are time consuming, and retroactive tracking does not reflect a deliberate attempt to source local.
- Processed foods often do not provide product origin information on the packaging.
- Purchasers often do not know what food items are produced nearby, how to buy it, or when it will be available.

3.2 Challenge: Buying Local

- As described in more detail in the Preliminary Report, mainline food distribution networks are based out of Winnipeg, Manitoba, and thus many of their suppliers come from Western Canada and the United States. Supply chains from Southern Ontario are not well established, making sourcing local Ontario products more difficult.

- Health care institutions and childcare facilities take considerable precautions to ensure that the food they serve is safe and free of contaminants. They rely on food safety protocols such as Canada GAP and HACCP certification for quality assurances. Producers without food safety programs, and documentation, may find it difficult to enter the institutional marketplace.
- Although provincially inspected meat and poultry is just as safe as that from federally inspected facilities, most mainline distributors carry only HACCP certified meat products (due to the international and interprovincial nature of their businesses). It is more difficult to source provincially inspected meat from local suppliers, and some institutional purchasers are under the impression that the Long-Term Care Act prohibits the purchase of anything other than federally inspected meat. This is not the case, however; protein from provincially inspected facilities is safe, and permissible under the LTC Act.
- Local food is very popular in Thunder Bay, thanks to the considerable efforts taken on behalf of the Local Food Strategy, the Thunder Bay District Health Unit, the Thunder Bay Country Market and the promotional work of individual producers. There is anecdotal evidence that many local producers are able to sell all, or most, of their product directly to consumers at higher retail prices. While some producers are in the process of scaling up their operations and coordinating tighter supply chains, it appears that demand for local (from around Thunder Bay) exceeds current supply.
- Local producers and small-scale processors are not familiar with the food safety and quality specifications that institutional purchasers require that are different from the retail and restaurant market. Working through the details takes precious time and effort from both parties.
- Not all food service and nutrition managers are interested in local food procurement to the same extent. Change is difficult for some, and many of the strategies proposed here and in the resource guides require additional time and effort that some staff may not be prepared to sacrifice.

3.3 Challenge: Quality and Service Guarantees

- Institutional purchasers have very limited flexibility with their menus, compared to the restaurant market; once menus are set, approved and filed with the Ministry. Substitutions need to be comparable, and documented. If an item or ingredient on the menu is not delivered, or is compromised, it will be purchased from another supplier. Suppliers have to make quality and service guarantees to institutional purchasers in order for them to have confidence that their needs will be met.

- Local food is perceived to be more expensive than the imported alternatives. While this may sometimes be the case, BPS project managers in other parts of the province have found that local food substitutions are usually cost neutral. Furthermore, raw food budgets do not account for savings that could be gained from accounting for food waste.

3.4 Challenge: Raw Food Preparation

- Long-term care facilities and childcare centres operate on very limited resources, placing limitations on human resources spent on in-house food preparation—cleaning, chopping, prepping and cutting. Whole foods require more preparation than prepared foods; so called “ugly foods”—such as unusually shaped fruits and vegetables—even more so.
- While institutional kitchens are staffed with highly qualified and well-trained food service professionals, including Red Seal chefs, there are not enough meat cutters—people who can break down whole animals into cuts that can be used in food service. Nose-to-tail food preparation is not common in institutional settings.
- Storage and work space in child care centres is very limited, making it challenging for cooks to purchase volumes of in-season produce (when it is often cheaper) to be prepared and stored for use in the colder months.

3.5 Challenge: Local Food Tracking Systems

- Tracking the volume or dollar value of local food purchases is difficult without reliable, easily accessible information about where the food comes from. When information is not readily available through suppliers through quarterly or annual velocity reports, purchasers have to spend valuable time digging for the information.
- Information about food provenance is often only available after food has been purchased and delivered. Storeroom audits are time consuming and expensive to conduct.
- Record keeping systems have to be created and tailored to suit individual practices or preferences. Many BPS local food fund participants keep records manually in a custom designed spreadsheet, and refer to receipts from specific suppliers.
- Because much of the food delivered to institutions in Northwestern Ontario arrives via Manitoba, distributors have not started using the Product of Ontario tracking software that the divisions of the same companies (Sysco, GFS, Sodexo etc.) use in Southern Ontario. Velocity reports that

include “Product of Ontario” and “Product of Northwestern Ontario” are not available through the mainline suppliers, yet.

- Traceability software is an expensive business innovation for the smaller distributors, and the technology is still being tested. Not all small to medium sized distributors are able or willing to make the investment. (However Loudon Bros. and L.A. Quality are making the investment in traceability software and will soon be able to provide more detailed information to their clients.)

3.6 Challenge: Measuring Change

- Without baseline data on how much local food is currently being purchased, it is difficult to measure how much change in spending or volume of purchases has occurred.
- Small changes in the local food economy such as shifts in production, and crop loss, can have a significant impact on purchase volumes—both positive and negative. If, for example, a local dairy or abattoir closes, local food purchase figures could decline significantly, despite numerous gains in smaller volume, or lower value food items.
- Local food procurement tends to focus on dollars spent as a proportion of the total raw food budget. Qualitative indicators, such as increased client satisfaction, reduced food waste, improved staff morale, or the impact of local food promotional activities are more difficult to ascertain, but no less meaningful.
- Establishing a baseline and measuring change is time consuming and can be difficult, especially if consumer surveys or food waste audits are being used as data collection tools.

3.7 Challenge: Reporting Meaningful Gains

- Reporting activities and financials is another time consuming activity for managers who are already spread very thin.
- Telling a meaningful local food story requires more than just reporting financial spending and volume increases; people are interested in the “experience of local”.

4.0 The Thunder Bay Local Food Procurement Model

The Thunder Bay Local Food Procurement Model is designed to guide institutional food service providers through the process of defining a shared vision and plan for institutional local food for the City of Thunder Bay. The model is based on the formation of a municipal committee that will convene regularly to plan and implement strategic actions that will contribute to the realization of a strong and resilient local food system. The model is designed specifically for the institutions that are administered directly by the City of Thunder Bay. It contains within it, however, insight, techniques, tools and resources that may be useful for other institutions and municipalities in Northwestern Ontario.

The Thunder Bay Local Food Procurement model involves three parts:

The Municipal Food Procurement Team: This is a group of staff members from each of the seven municipally administered broader public sector institutions that convene regularly to set procurement targets and plan and implement strategies and activities that support the local economy and are consistent with the Thunder Bay Food Strategy. The model includes a draft Terms of Reference that the Team can use to guide their meetings.

Municipal Food Procurement Team Strategies: A strategy is a method for achieving a particular goal. The strategies presented in this section are intended to guide the approach of the Municipal Food Procurement Team as they create a plan to increase the use of local food in their respective institutions. These strategies are different than, but may be similar to strategies used to achieve the objectives laid out in the Local Food Procurement Plan.

Creating a Local Food Procurement Plan: The final component of the model presents guidance for the Municipal Food Procurement Team to create a comprehensive plan that will address the local food challenges described above and in earlier stages of this research project. This section describes how to establish a shared vision for municipal food procurement, set measurable procurement objectives and targets, strategize appropriate ways to approach each objective, and plan activities that will contribute to achieving each objective and reaching the overall goal. This part of the model presents a proposed framework that includes recommendations on appropriate objectives, strategies and activities that the Municipal Food Procurement Team can tailor as they move forward in the planning process.

The model provides a structure within which municipal and community partners may collaborate in order to achieve their shared vision of a strong and resilient local food system in the Thunder Bay region.

4.1 The City of Thunder Bay Municipal Food Procurement Team

During the two-day workshops held in November 2015, the manager of supply management indicated a commitment to convene a series of quarterly municipal food procurement meetings. The quarterly meetings involving institutional staff and other food system stakeholders would provide a foundation from which the group could collaborate in the pursuit of a local food agenda.

A draft terms-of-reference for a municipally run procurement committee was presented to the manager of the Supply Management Division following the workshops. A further amended version can be found in Appendix D. The Municipal Food Procurement Team (working title) is the vehicle for building capacity and creating momentum for a cultural shift toward purchasing and serving locally produced food in the seven municipal institutions.

Headed by the manager of Supply Management, the committee will convene quarterly to discuss purchasing decisions, budgeting, and local food substitutions. The meetings will also include a structured opportunity for committee members to meet suppliers and farmers, learn about new local food items available for institutions, share their procurement specifications with distributors, and learn about new menu items that can be included in institutional menus through cooking demonstrations.

The Municipal Food Procurement Team (MFPT) will build on early achievements by integrating consistent local food procurement practices across the seven institutions. Working together, the committee will inform, encourage and empower staff to implement operational changes that are consistent with the objectives of the Thunder Bay Food Strategy. The process of facilitated collaboration will support a cultural shift that prioritizes local food in food services for each of the institutions.

The ultimate goal of the committee is to simplify, or streamline, local food purchasing and measurement (tracking) for buyers across each of the seven institutions. The committee will do this by:

- Designing a data collection tool to measure values of local and non-local food procured by each of the seven institutions in 2014;
- Establishing a reliable baseline figure from which to create procurement targets for each of the seven institutions over the next two quarters;
- Developing a list of key-performance-indicators with which to evaluate efforts to procure local food;
- Creating a Local Food Procurement Plan that clearly defines a shared vision for municipal food procurement, and sets measureable procurement

objectives and targets. The plan will include appropriate strategies for each objective, and clearly articulated activities that will contribute to achieving each objective and reaching the overall goal;

- Holding quarterly meetings with institutional food service staff and managers to plan, implement and evaluate local food procurement activities;
- Periodically (annually) evaluating the effectiveness of the local food procurement plan and adjusting objectives, strategies and activities accordingly;
- Supporting and advocating for municipal policy innovations that are consistent with the Thunder Bay Food Strategy and that contribute to a resilient local food system.

The activities of the Municipal Food Procurement team will include, but is not limited to:

- Establishing benchmarks and local food targets;
- Auditing menus for local food opportunities;
- Auditing purchases to measure local food procurement volumes gains/losses;
- Coordinating food purchases;
- Identifying new local supply lines and standards of practice; and
- Facilitating conversations and building new relationships across the food supply chain.

A more detailed exploration of how the Municipal Food Procurement Team can strategize their time together to design a local food procurement plan follows.

4.2 Municipal Food Procurement Team Strategies

The local food procurement strategies presented below are methods of engaging with each other and with external committee members and food systems stakeholders that emphasize values, and reinforce the purpose for each committee member's participation. These principles form something of a *modus operandi*—a particular way of doing things that characterizes the group, clarifies expectations of conduct and the reinforces the reasons that each member participates. Taken together, these methods form a strategic approach to food procurement planning and implementation that will ultimately ensure that the team is able to work collaboratively, and engage with external stakeholders effectively. These principles also ensure that the working environment is supportive, that members are able to contribute in a meaningful way, and that participants feel rewarded.

The strategies below are defined and described within the context of procurement objectives and activities that are expanded upon in the Local Food Procurement Plan.

4.2.1 Collaboration

Collaboration is the act of working with others to achieve or create something. It's a process through which agents interact "for mutual benefit and a common purpose by sharing risks, responsibilities and rewards" (Himmelman, 2002).⁵ Effective collaboration is critical to the success of any local food procurement endeavour. Collaborative processes involve information exchange, supportive capacity building, mutual enhancement and resource sharing.

For collaboration to truly work, groups may find that they have to look for new partners outside of the "usual suspects" in order to build a community of practice that is invested and committed to creating change within the food system. Nutrition and Food Service Managers, chefs, centre managers, storekeepers and registered dietitians are all important partners who should be at the table. Long-term care residents, support staff, teachers, and parents may also have valuable contributions to make to the group as well, and should be consulted from time to time to ensure that the local food procurement strategy is achieving the desired outcomes.

Meaningful collaboration also applies to the relationships between purchasers and suppliers. While stakeholders from the supply line cannot become full partners in the food procurement endeavour (due to conflict of interest issues), it is possible to achieve mutually beneficial ends through collaborative means. Collaborating effectively with stakeholders in the supply line will help create local solutions to food service issues that will support institutional procurement objectives and give food services a competitive advantage with other buyers in the region. Collaborating with suppliers may result in the identification of new local products appropriate for institutional use; the creation of safer, more reliable supply chains; or the development of tracking and measuring information systems. The team will be able to share responsibility and ownership of the project across the food system.

Opportunities to collaborate may be informal or structured. One of the strengths of this model is that the MFPC provides regular meetings between key partners and offers an opportunity, at least quarterly, to connect with key stakeholders from across the food system. Collaborating with other organizations, such as the school board, public health and the university will uncover even more opportunities for partnerships, build connections between suppliers and producers, establish distribution networks and strengthen the community food system overall.

⁵ https://depts.washington.edu/ccph/pdf_files/4achange.pdf

4.2.2 Learning

Providing meaningful learning opportunities for the institutional MFPC members is a central objective for each quarterly meeting. The MFPT meeting standing agenda includes a cooking demonstration featuring the innovative use of a local food product that institutional staff can incorporate into their menus (an example of capacity building). The meetings also allow time for the group to collaborate (through exchanging information of mutual benefit) with producers and suppliers, local food stakeholders and other food service professionals.

Informal learning opportunities arise every time partners connect with suppliers or their peers from other organizations. It is important to take full advantage of these opportunities to ask questions and share information with others, including those from other institutions united in the same pursuit. By engaging participants in a continuous learning process, the MFPT supports the adoption of a culture of inquisitiveness. Inquisitiveness uncovers new information which, when shared, can further reinforce the likelihood that the group will achieve its procurement objectives. There is no limit to what learning new information can help produce.

Sample learning objectives:

- Identify local and Ontario products that are available from existing supply partners.
- Discover new recipes for seasonal produce that institutions in other parts of the province are using.
- Find out what the crop outlooks are for various local food items early in the season. Connect with producers regularly to see if a bounty harvest or crop loss is expected, and develop recipes with that in mind.
- Learn “tip-to-tail” and “root-to-leaf” techniques and recipes to reduce costs and food waste.
- Find opportunities to connect with small food processors in the area that can help develop safe, high quality semi-processed or prepared foods that can help take pressure off labour expenses in the institutions.

4.2.3 Communication

In keeping with the earlier elements of the model, effective communication is vital to the internal operations of the MFPT because it ensures that all of the partners are on the same page, working toward the same goal, and are contributing to their full abilities. Creating an environment that encourages full participation of the team members is crucial—members and invited guests of the MFPT should be made to feel that their time and input is valued. Each individual that is present should feel comfortable contributing and leave each meeting confident that their voice was heard. Similarly, communicating expectations of participation ensures that members are aware of their responsibilities to the group, and are able to plan their contributions.

As the saying goes, if you don't ask, you don't get. Maintaining regular and open communication with suppliers and producers will help them respond better to the growing institutional demand for local food. Ensuring that supply partners, and each of their sales reps, are well aware of the local food strategy will make it much easier for them to respond with information regarding local food items in the inventory, or provide suggestions about new items that are local but may not be part of the menu. Let suppliers do some of the work to earn more business from the broader institutional sector.

Information sharing is central to procurement planning because the food business is fluid—change is constant. It is important for each team member to stay up-to-date on (learn) the status of new product approvals, new approved vendors, changes to procurement rules or requisition practices, new food safety policies and local crop status reports. Individual members should feel comfortable (and excited) to report back to the group about what they have learned through their own independent explorations. Each individual will have their own knowledge and experiences to share about their interactions with suppliers, and product and service quality. This is important information for the rest of the group to know, too.

4.2.4 Leadership

The City of Thunder Bay is a recognized leader in food systems planning, and now institutional local food procurement. The city has an exciting opportunity to share the knowledge and know-how with other institutions in the region to further leverage institutional buying power and drive economic development and innovation within the regional food and agricultural sectors.

Collaborating regularly with partners across the food system will help achieve sustainable change in procurement practices. Workshops and special events, such as the proposed annual local food procurement forum, have proven to be effective tools in translating and transferring knowledge across sectors and between institutions. Meetings and events are also motivating for individuals involved in the project. Institutional local food procurement is not easy; sometimes it helps to know you're not in it alone. Proponents of local food procurement can add the topic to the agendas of regularly scheduled Ontario Hospital Association meetings, and gatherings of regional childcare providers, public health events, and annual general meetings.

Cultivating a local food culture within each individual institution is important, too. Each of the committee members should be encouraged to share information about the local food strategy with their colleagues to help build commitment to the changes. When on board, teachers at the childcare centres will share the local food story with students and parents, and others in the community, and the momentum will continue to grow.

Staff turnover and retirements can have a significant effect on how a kitchen is run, and the way food is procured. Often, when an institution has made considerable changes in food service to create a more local, sustainable menu it is usually driven by one or two passionate individuals. When local food champions move on (or when special project funding runs out) institutions that have not built local food into their culture risk losing all of the gains that were made. It sometimes requires considerable effort to get back on track. One way to avoid losing momentum in the kitchen is to incorporate sustainability values into job descriptions for food service management and staff, and make hiring decisions accordingly.

4.3 Creating a Local Food Procurement Plan

Setting well defined, and realistic goals and objectives for the local food procurement plan is one of the first, and most important steps the MFPT can take to ensure success. A plan that works is a plan that has a goal that makes sense, is visionary, and is meaningful. It is a plan that has measureable, clearly stated and realistic objectives that can be reviewed throughout the implementation process (results based management) and after (project evaluation) to gauge the team's progress. A plan that works provides strategies that guide the proponents through the implementation process in a way that is consistent and effective. Finally, it is a plan built upon activities that directly contribute to the achievement of one or more of its objectives.

An effective planning process highlights each of the strategies described above:

Collaboration: The process of creating a Local Food Procurement Plan should be a collaborative so that it adequately reflects the capacity and resources of the institutions as well as the skill sets of the individuals that will be implementing it.

Learning: Some preliminary research may be required in order to set realistic targets or design effective strategies and activities. A solid plan includes realistic, achievable objectives (and procurement targets) that are based on a strong foundation of knowledge about current procurement practices, community resources and assets, the agricultural economy, local food networks, and market dynamics. It doesn't make sense to set an objective to meet with 25 food distributors each year if there are only 10 that do business in the area.

Communication: Each member of the MFPT should feel comfortable participating fully in the planning process to ensure that meaningful objectives are defined, and activities can be carried out on time or as planned.

Leadership: Effective teams reflect competent leadership. Ultimately, someone has to be responsible and willing to take the lead on specific activities, including creating the procurement plan.

4.3.1 Begin with a Guided Discussion

Following the establishment of the Municipal Food Procurement Team, the local food procurement planning process should start immediately, at the first meeting with an open, facilitated discussion between the core team members. There is a lot of ground to cover in the initial meeting—the committee should be prepared to spend at least two hours discussing the purpose of the committee (setting a goal), what each member hopes that the committee will achieve (setting objectives), the strategies that should be used to guide engagement, and the specific activities that will lead to the achievement of the objectives.

A series of questions that cover most of the main facets of local food procurement will guide the creation of the plan. The information drawn from the discussion should be recorded and then one or two members should take it away and draw up a plan based on what was discussed. Although many of the answers to these questions may seem intuitive, going through the exercise as a group is a helpful way to ensure that all of the team members are on the same page, are aware of their roles and responsibilities, and have shared expectations for moving forward.

Answering these questions will also help clarify some of the misunderstandings, and settle the a few of the “unknowns”—those tricky details about food safety rules or GPO contracts that not everyone agrees on—so that all partners are operating under the same guidelines when making and tracking purchases.

1. Why is your institution choosing to serve local food? Why is it important to our organizations?
2. According to the government of Ontario, local food is defined as anything that is grown or raised in the province. Based on this definition, what local food is your institution currently serving?
3. Considering your location in northwestern Ontario, how suitable is this definition? How would you change the definition?
4. How will your local food program begin? (e.g. one new type of local food such as beef or produce, one local meal each week, a certain percentage of all food served)?
5. How will your institution’s local food program grow in the future? Is this vision realistic? Is setting a local food target for a percentage of food procurement realistic? How will you measure your results?
6. Are there budget opportunities or constraints that need to be considered?
7. Are there opportunities or constraints regarding your relationships with current food distributors that should be considered?
8. Are there opportunities or constraints regarding the availability of local food in your region? What are they?
9. Does your institution have food quality, food safety, volume or service concerns? If yes, what are they? (Be as specific as possible and write these concerns down so you can share it with suppliers.)

10. What criteria will be used to judge success or failure?
11. If we achieve our procurement targets on time and within budget, what else will indicate our success?
12. Who has stake in this endeavour?
13. How do various food system stakeholder's goals align? How do they differ?

Use these questions to guide the process of setting a goal and specific objectives. Once the goal and objectives are set, the team can identify activities and strategies that will support the team accomplish these objectives successfully.

The goal is the project's destination. It's useful to start with a broadly ambitious goal that describes what the world will be like when the project is successful. The goals (there may be one or more) may be drawn from the Thunder Bay Food Strategy objectives for local food procurement. It's important to state the goals as the end point—it's the vision of the future, not the process of getting there. A goal is a statement about how the food system will be changed as a result of the successful project. Thus, a goal for the local food procurement plan could be:

The City of Thunder Bay institutional food supply procurement spending will help build a public sector food supply chain that contributes to the economic, ecological and social well-being of Thunder Bay and Area.

Objectives provide an organizational approach to meet the higher order goals. They are operational, meaning they indicate what will be done in order to contribute to the realization of the goal, and they are measureable. There is a clear indication when an objective has been achieved or not. Objectives describe the specific things that will be accomplished by the project, but do not fully identify what actions have to be taken in order to meet the objective. Objectives include the quantitative or qualitative degree, amount or level of achievement or change. Objectives should be specific, measureable, action-oriented, reasonable, and time-bound.

Objectives may be process oriented or outcome oriented. Process oriented objectives refer to operational changes that will contribute to the overall goal. A suitable process objective for the Local Food Procurement Plan would be:

To develop a shared system of tracking and measuring local food purchases for the seven broader public sector institutions.

This objective is measureable by determining whether or not a tracking tool was created and used.

Outcome objectives describe a measurable, expected outcome. A suitable outcome objective for the Local Food Procurement Plan would be:

The City of Thunder Bay institutions will increase local food spending by 15% in 2015.

Attainment of this objective is determined by measuring the amount of local food spending against the baseline data for the fiscal year.

Clearly stated, measurable objectives facilitate results-based management and evaluation, and form the basis for the project activities that are integrated and consistent with the overall goal. Recommended procurement activities that may be easily integrated into the Local Food Procurement Plan are discussed in more extensive detail in the section below.

5.0 Procurement Activities

The two field guides produced to support institutional procurement by the City of Thunder Bay offer several suggestions on ways to increase public spending on locally produced food. The guides are designed to meet the needs of a range of different types of institution—from small day cares and residences to large hospitals, universities and long-term care facilities. Throughout the course of the project it became evident that a coordinated approach to food procurement for the seven municipally administered institutions, facilitated by the Supply Management Division, was the most appropriate strategy to move forward. The following is a list of suggested procurement practices to be explored by the new food procurement committee, and are adapted and expanded ideas from the field guides.

5.1 Menu Planning

LTC and daycare menu planning is conducted annually by management staff. Menus are approved by a registered dietician and filed either with the health unit or the Ministry of Health and Long-term Care. The current process is described in greater detail in the preliminary report. The following suggestions build on the ideas presented in the field guides, and can be interpreted into objectives and goals through the MFPT during the planning process.

- Change menus as often as is permissible. (At least four menu cycles per year.)
- Extend the opportunity to participate in menu planning to other staff members. Include chefs, cooks and storekeepers and interested teachers and/or care workers.
- Build menus around the seasonal availability guide and the institutional procurement guide.
- Explore “nose-to-tail” and “root-to-leaf” recipes to reduce food costs and food waste.
- Maintain some flexibility on the menu. Plan ahead using menu items such as “seasonal mixed vegetables” instead of “peas and carrots”. Where appropriate, be vague. Use more of what’s available when it is available. Refer to a list of seasonal foods often. Place the seasonal availability chart in a prominent spot so that it can serve as a constant reminder to buy local.
- Use the Menu Planning Product Origins Chart (Appendix E) to help plan a menu that highlights local procurement.

- Re-imagine menu mainstays such as salads, mixed vegetables, pastas, soups and stews.
- Cook more from scratch. Explore efficient, cost-effective ways to produce entrees from scratch as an alternative to heat-and-serve menu items.
- Allocate time and resources to on-site processing, or joint processing with other facilities to make the best use of seasonal harvests. Preserves, soups, stews, sauces and some desserts can be made in bulk and stored in the freezer for up to six months. It may save time and money down the road.

5.2 Authenticating “Local”

- Buying direct from a regional producer is the most straightforward way to guarantee that an item is local. Check in with suppliers regularly to find out where they are sourcing from, and learn more about their supply lines as well. Schedule time to pay a visit to producers and distributors warehouses to learn more about their businesses and additional products or services they may offer.
- Think beyond produce. Local food includes meat, poultry, prepared foods, processed foods, dairy products, honey, maple syrup. Keep a running list of brands, labels and companies that are known for having high local content.

5.3 Food Waste Auditing

By evaluating the source and cost of food waste, and taking action to limit loss, more of the limited institutional budget can be redirected back into raw food purchases.

- Evaluate the popularity of existing and new menu items by conducting a plate waste audit or a short survey at meal times.
- Allow diners time to experience and adjust to new foods and assess what local foods are being eaten and those that are less popular.
- Adjust the menu accordingly, and continue to provide diners an opportunity to provide feedback on what they would like to see on the menu to support decision making.

5.4 Tracking Purchases, Monitoring Progress, and Evaluating Results

Tracking and monitoring the amount of local food purchases is difficult without a streamlined reporting system and advanced tracking software. While many mainline distributors in southern Ontario are happy to facilitate tracking and

monitoring by providing velocity reports that contain information on the food provenience of purchased items (specifically on products from Ontario), the suppliers from Manitoba have yet to adapt their software to provide similar reports to institutions in the Northwest.

- Continue to ask distribution managers, sales reps, and producers for updated information about the local food supply.
- Connect with various stakeholders within the supply chain to inform them that you are interested in more information about where food is produced *before* you buy it. Work with them as they collect information and share your insights with peers.
- There's power in numbers. Coordinate efforts with other organizations, including restaurants, to request food provenience information reports from mainline distributors. They will be more likely to respond if they recognize a larger demand for the service.
- Break away from the larger (mainline) distributors. Smaller, locally based businesses take pride in customer service, and are committed to supporting their local communities. Sourcing high quality local food is quickly becoming a competitive advantage for these businesses because it gives them an edge over larger distributors that are not as nimble implementing structural change. Loudon Brothers, LA Quality Foods and Belluz Farms are all in the process of incorporating advanced tracking software into their logistics systems to provide greater transparency. They are committed, excited, and want to see change. These companies are actively sourcing more food from the Thunder Bay Region, Northwestern Ontario *and* Southern Ontario in response to growing demand.

Velocity reports only provide a snapshot of the whole local food picture; there are many other strategies to document local food procurement achievements while Sysco Winnipeg and other large suppliers implement new tracking services for their clients in Northwestern Ontario.

- Reframe measurement indicators in local food reporting requirements and performance management agreements. Go beyond dollars and volume. Draft a list of key performance indicators to support the local food procurement plan. The Greenbelt Fund has suggested a sample of other numbers to report:
 - Number of new supply partners.
 - Number of suppliers and producers engaged through the MFPT meetings and informal meetings or encounters.
 - Number of local (Northwest/Ontario) farms featured on the menu.
 - Number of local products purchased.
 - Number of Product of Ontario food items.

- Number of Product of Ontario menu features.
- Number of local food feature meals served.
- Number of farm or distributor site visits.
- Number of staff trained in local food literacy.
- Number of annual local food events held.
- Number of participants attending local food events.
- Number of media hits.
- Number of social media hits.
- Number of farm to fork events attended.
- Number of new local food menu items served.
- Number of local food promotional pieces in dining rooms, menus, newsletters etc.

Track changes over time, and make a note of where gains have been achieved, even if purchase volumes don't immediately reflect the effort. Change takes time, and incremental changes can have a huge impact in the long run.

Qualitative data can also be reported. Consider conducting a simple customer satisfaction survey about the changes in food service.

- Ask clients about their favourite local food features, find out if serving local is important to them and why, and learn what they would like to see more of on the menu. These stories add meaning to the numbers described above, and resonate strongly with members of the community.
- Achievements in local food procurement can have tremendous impact among kitchen staff as well. Incorporating local food into menus and preparing more food from raw, whole ingredients has been attributed to higher morale and improved productivity in the kitchen. Review how the local food strategy has resonated with members of the food service team. Ask staff about the challenges, as well as the rewards they experienced when working with new food items. Find out from the food prep team what they need in order to make local food work more efficiently. Identify what can be tweaked in the system to make better use of time, reduce food waste, and improve taste and quality of meals.

Program evaluation is a powerful tool that can be used to measure the effectiveness of different procurement activities. The best evaluations are based on comprehensive plans that set measurable targets that are linked to a process through which those objectives will be achieved.

- Review local food key performance indicators that are included in the performance management agreements with each member of the MFPT each year.

- Review the goal, objectives, strategies and activities of the local food procurement plan (described above) each year. Identify which activities are the most effective at helping your team achieve the procurement goal, and which activities, if any, fall short of expectations. Tailor the work plan accordingly, and continue to move forward. Don't be afraid to ditch strategies or activities that are not working well, proving too expensive, or too time consuming and take a new approach.

6.0 Growing the Local Food Supply Chain

The purpose of implementing a local food procurement plan for the City of Thunder Bay is to help strengthen the local food supply chain by supporting local food businesses and agricultural producers. As has been noted, the institutional demand for local food—specifically food that is grown and/or made in Northwestern Ontario—is very strong. There is considerable opportunity for producers and food processors to innovate and expand in order to better meet the institutional need. This section explores what the City of Thunder Bay and other stakeholders can do to build a vibrant and sustainable local food system.

Investment of time and resources into broader public sector spending on local food is an excellent example of how the City of Thunder Bay and its various agencies and departments can implement policies or practices that promote local and regional markets for food produced in the region. This commitment to the local food economy is critical, but it relies on an adequate supply of local food channeled into the institutional distribution networks in order to be truly effective. The Local Food Procurement Plan is directly tied to activities that will support growth along the supply chain.

The Thunder Bay Food Strategy outlines a series of recommendations and actions that support the goal of protecting and encouraging growth in farm-scale production so that a greater proportion of food is grown, raised, prepared, processed and purchased closer to home. The Food Strategy identifies the opportunity to leverage food procurement spending as a tool for community economic development by supporting new and existing farms and commercial food processing businesses expand and create new jobs. Thunder Bay benefits from a culture of mutual support and a highly integrated group of stakeholders working towards achieving systems wide change within the local food economy. Community partnerships have been effective in creating opportunities for local stakeholders to connect and create new business propositions. There are also many funding and business-planning resources available that are tailored specifically to make the business propositions conceived at community events a reality. Unfortunately, information about the funding resources and small business services is not always widely known, and the application process can be difficult, time consuming, and even intimidating for some. Connecting local farmers and business owners to the funding resources and business development programs is a crucial next step in the process of strengthening the local food system.

A representative from the Thunder Bay Community Economic Development Commission presented information about the programs and services available to support local food businesses to a group of farmers, food distributors and institutional procurement professionals at the February 2015 Strengthening

Connections meeting. The agricultural community could benefit from more exposure to the Thunder Bay CEDC and similar organizations that can facilitate business planning, and applying for funding.

Several events have focused on “match-making” between producers and purchasers with the intent of fostering new business relationships. In a similar way, organizing and hosting an agriculture and food business summit that connects entrepreneurs and farmers with municipal, provincial and federal funding could contribute to capacity building for local businesses that are not operating at a sufficient scale to serve the institutional food market.

While there is considerable desire among broader public sector institutions to purchase local food from community producers and processors, food safety guarantees are paramount. While food processors and abattoirs are all closely regulated by provincial food safety authorities, food safety certification for local fruit and vegetable producers remains voluntary. Many institutions from southern Ontario cite Canada GAP certification as a minimum food safety requirement for all of their suppliers. The Canada GAP certification protocol has been recently amended and now requires GAP certified food distributors to source from GAP certified producers—the rules no longer allow certification by proxy. A food safety symposium for producers interested in completing HACCP and Canada GAP programs will facilitate greater uptake of food safety programs and expand market opportunities for local horticultural producers. Growing Forward 2 offers funding and support services that support the implementation of food safety and traceability programs by food producers and processors.

The City of Thunder Bay can take further action to support the development of appropriate land use and economic development policies and regulations that promote local and regional markets for foods produced in the region by engaging the agricultural community more directly in municipal policy formation. Agriculture and Rural Affairs advisory committees, responsible directly to council, are powerful tools for rural and agricultural economic revival, unfortunately, not all cities have them. These committees are composed of municipal council members and staff, and include representatives from farm organizations and civil society. They serve to advise council on how programs, regulations, by-laws and policies will affect the local agricultural community; contribute to the creation of rural official plans; and liaise between the municipality and communities of farmers and rural residents.

A coordinated agriculture and rural affairs committee directly linked to regional municipalities will also serve to support comprehensive economic development planning around food. As a strategic committee, this group may be able to commission external consultants to conduct agricultural economic profiles, rural and agricultural action plans, and feasibility studies for major agricultural innovation investments that will serve to strengthen the local food system, build jobs, and promote sustainable farming practices. Investment partners will not be

able to provide farmers with adequate programming and funding support without accurate, and up-to-date information about how the land base is being used, the types of agricultural activities that are thriving and those that are not, and where there are potential gaps in the supply chain. This form of research will also serve to compliment the efforts to connect producers with local funding and business planning services. Agricultural profiles provide a foundation of knowledge from which farmers and entrepreneurs can identify and prove market opportunities to government funders and financial institutions.

Rebuilding food distribution infrastructure is a priority for many communities seeking to reintegrate local food production and consumption. The food hub model is often presented as an ideal approach to reconfiguring food distribution. The concept of what a food hub is tends to be interpreted differently by individual communities, based on the unique needs as defined by the local residents. For the purposes of this discussion, a food hub is a central storage, processing and distribution facility that focuses primarily on new local food supply chains. The expansion of mining activity in Northern Ontario provides strong incentive for Thunder Bay to explore the feasibility of a distribution food hub that will aggregate raw food product, provide value-added processing facilities, and network local food supply chains. Because the supply lines that are serving the northern mining camps are embryonic and set to expand considerably, the City of Thunder Bay has a very unique opportunity to create new supply lines, rather than re-imagine or reconfigure existing distributions systems.

The federal and provincial governments have invested heavily in food and agriculture over the last several years. Each of the opportunities for investing in the resilience of the local food system described above is eligible for funding that is distributed across a number of funding programs. For more information on funding opportunities, refer to the OMAFRA website:
<http://www.omafra.gov.on.ca/english/food/industry/funding-prog-index.htm>

Appendix G provides a list of government programs that provide funding for Agri-Food activities.