

*Re-building Montana's  
Food Systems:  
Grow Montana Coalition*

*Formative Evaluation Report  
January 2005 – April 2006*



*August 2006*

**Acknowledgements**

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Pam Mavrolas, External Evaluator

*By Pamela Mavrolas, External Evaluator  
Mavrolas & Associates*

# Table of Contents

**Executive Summary**.....*i*

## **Evaluation Report**

**I. Program Overview**..... 1

**II. History and Context**..... 2

**III. Evaluation Model and Methodology**..... 3

**IV. Evaluation Findings and Recommendations**.....4

**A. Overarching Findings**.....4

**B. Policy-Related Findings and Recommendations**.....5

**C. Accomplishments Other than Policy**.....8

**D. Research, Communications and Outreach**.....11

**E. Effectiveness of Coalition and its Leadership**.....17

**F. New Capacity for Food Systems Change**.....19

**G. Lessons Learned**.....21

**V. Additional Thoughts of the External Evaluator**..... 24

### **APPENDICES:**

Appendix A: Learning Loop Model

Appendix B: Grow Montana Evaluation Plan Narrative

Appendix C: Eleven Evaluation Tools (used to collect data for this report)

# Grow Montana Formative Evaluation Report

## Executive Summary

### **I. Introduction and Program Overview**

Grow Montana's purpose is to enable Montana's food producers to meet more of the state's food needs. Grow Montana promotes economic development policies that support a sustainable Montana-owned food production, processing, and distribution system, that will improve all residents' access to Montana grown foods. Grow Montana's vision for a community-based food system is guided by principles that set it apart from any other agricultural development program ever proposed in the state. The Grow Montana coalition strives to create a food system that:

- Creates the means for more of Montana's food and farm products to be used closer to home.
- Retains more of the value that's added to Montana's agricultural products in its communities.
- Improves access to healthy, nutritious food for all Montana residents.
- Reconnects Montana's rural and urban communities and economies.
- Enhances stewardship of Montana's natural resources.

#### **Key Players:**

Grow Montana is a collaborative project of the National Center for Appropriate Technology (NCAT); University of Montana-Missoula, Environmental Studies Program (UM-EVST); Alternative Energy Resources Organization (AERO); Lake County Community Development Corporation (Lake County CDC), Artemis Common Ground (Artemis), and Stranie Ventures LLC.

#### **Program Goal and Objectives**

The Grow Montana project has adopted the following outcome goal and three objectives that, along with six major evaluation questions, are the basis for this evaluation.

**Outcome Goal:** Montana's policy and economic climate, resources and infrastructure will support an emergent, community-based food system and sustainable agricultural economy.

**Objective #1:** Identify the policy changes and infrastructure needed for development of community-based, local and regional food and agricultural enterprises.

**Objective #2:** Build a diverse coalition and a broad base of political support for common-sense solutions to the problems faced by Montanans working to build a secure, Montana-based food economy.

**Objective #3:** Make the changes necessary to foster a more Montana-based food economy.

#### **The Evaluation Report**

This Grow Montana evaluation report is **formative and spans a 16-month time period from January 1, 2005, through April 30, 2006**, although the W. K. Kellogg Foundation grant officially began in May of 2005. Grow Montana, the client of this evaluation, wanted to capture the learning and accomplishments of its policy efforts in the 2005 Montana Legislative session in this report. Although the Grow Montana program includes legislative strategies and activities and this evaluation will document and assess their outcomes, no W. K. Kellogg Foundation funds have been used for lobbying communications or activities.

## **II. Evaluation Findings: Accomplishments, Progress and Setbacks** **Overarching:**

1. **Grow Montana's vision for a Montana community-based food system is exciting and attracting support from diverse constituencies across the state and has the endorsement of Governor Schweitzer's Administration.** Economic development agencies, food security and nutrition advocates, conservation organizations, conventional and sustainable agriculture interests, and educational institutions (including Montana State University Extension) are seeing new potential for value-added agricultural economic development that can improve the health and well-being of Montana's people and rural communities.
2. **The time-tested relationships between key leaders in Grow Montana, with their shared understanding and knowledge of food system issues in the state is a significant factor in the Coalition's immediate success.**
3. **The momentum for this vision is building so quickly that Grow Montana is having difficulty taking advantage of the burgeoning opportunities,** while keeping its program on track. Grow Montana's human and financial resources are stretched to the limit.

### **Policy-Related:**

4. The Grow Montana Steering Committee (GMSC) defined policy very broadly, including both private/corporate and public (local, state and national) administrative and legislative policy, and **worked effectively at all these levels. Grow Montana experienced tangible success in its first year promoting food systems policy** including:
  - Legislation and rules that allow state inspection of mobile meat slaughter units.
  - Model school district resolutions supporting local food in the schools.
  - MSU Extension Service approval of its first agent workplan that includes fostering community-based food systems, focusing on both agricultural development and food security.
  - Formation of a Value-Added Agriculture Committee by the Montana Economic Developers Association (MEDA) to develop policy.
5. The GMSC **set and is using specific criteria to decide which policy options to pursue.** This screen has been and continues to be a helpful tool in making strategic decisions about where and how best to leverage policy change in Montana.

#### **Criteria for Choosing Policies**

1. Will have significant impact.
2. Broadens our base of support.
3. Appeals to common sense.
4. Have needed resources.
5. Success likely.
6. Not politically polarizing.
7. Promotes sustainable, community-based economic development.

### **Accomplishments Other Than Policy:**

6. **The Governor's Food, Farms and People Planning Conference laid the foundation for cooperative policy change by a diverse and powerful set of stakeholders, many of whom had never worked together.** The Conference, attended by 65 key leaders (invitation only) from state and federal government, economic development agencies, anti-hunger and nutrition advocates, conservation organizations and conventional and sustainable agriculture organizations, began to **create a new vision for Montana food systems and agriculture.** Grow Montana

played a key leadership role in visioning, planning and executing the Conference. The **Conference was an unequivocal success, exceeding the expectations of its planners.**

7. **The Montana FoodCorps, the nation's first team of Americorps VISTA volunteers to work exclusively on developing farm to cafeteria programs,** was created by a Grow Montana and Montana Campus Compact partnership. Four VISTA volunteers will be working directly with food service directors and staff at three Montana institutions of higher education – Montana State University-Bozeman, Salish Kootenai College, a tribal college on the Flathead Reservation, and the University of Montana-Western at Dillon. A fourth will continue work on the pilot Farm to School program in Missoula County Public Schools.
8. Two Grow Montana partners, AERO and Lake County CDC, have **helped create and support over 20 businesses and/or community enterprises that can both "ground-truth" policy proposals** and create supply and needed infrastructure for Montana's nascent community-based food system.

### **Research, Communications, and Outreach:**

9. **Grow Montana embarked on two major research efforts this year,** a case study analysis of the University of Montana's (UM) Farm to College Program (FTC) and a public institutional food service market assessment. **Both studies are of high quality and the data being generated is proving valuable to the development of the program's policy agenda.**
10. Grow Montana's message is powerful and engaging. **Using an economic development frame, elaborated by the operating principles** (listed above on page i) **has proven to be a message or frame that works in Montana.**
11. **Grow Montana's strength is in forming personal connections and sound working relationships with other organizations and agencies.** Grow Montana's leadership in the Governor's Food, Farm and People Planning Conference demonstrates this. The Steering Committee partners have excellent interpersonal communications skills, passion for the issue and a cooperative style of leadership.
12. Steering Committee members have presented programs to **over 25 Montana organizations and public agencies, and conducted six Community Workshops** that describe the public institutional food service market assessment and engage participants in discussion of opportunities and barriers.
13. **Grow Montana is less successful in creating systematic communication feedback loops that continue to reinforce individual and organizational engagement.** Once individuals and organizations make the contact with Grow Montana and are interested in learning more and getting involved it's not apparent where they go next. **Both a public and intranet websites were launched by Grow Montana, and neither are being used to their full potential.**
14. **There are specific problems with Grow Montana's public and intranet websites.** The intranet site houses internal communication between Coalition partners and members, including Steering Committee meeting notes, the database, public policy research, etc. while the public site includes general information about Grow Montana. **The public website has not been well marketed and therefore is not yet well used by the general public.** It needs better links to partner organization websites and vice versa, and specific avenues for interested people and organizations to connect and engage in the Coalition's efforts. **The intranet website is designed to communicate information between the partner organizations, but it is not well used.** Steering Committee members tend to communicate through email. More importantly the database system for tracking contacts with interested individuals and organizations over time is operational on the intranet site, but little information has been entered as yet. **Grow Montana will need to build its collective database so that content can be shared and information followed up among its partners.**

15. **Grow Montana has had limited exposure in the Montana media.** Coverage in the standard Montana press has been sparse and limited to the Missoula, Great Falls and Helena daily newspapers. Radio coverage has been a bit more promising. When media do cover local food issues, they do not mention Grow Montana. Name recognition is poor beyond the leadership of groups with which Grow Montana works.

#### **Effectiveness of the Coalition and its Leadership:**

16. **The Grow Montana Coalition membership formally consists of the seven Steering Committee partners.** Although Grow Montana has a membership structure and a recruitment plan, no other organizations had formally "joined" by April 2006. While formal affiliation appears weak, informal working relationships are strong, as evidenced by support for Grow Montana's bills in the 2005 Legislature and participation in the Governor's Food, Farms and People Planning Conference. The barrier to organizations joining Grow Montana appears to be lack of Steering Committee member follow-up and persistence to "close the sale," not hesitation or resistance on the part of potential members and allies.
17. **The Grow Montana Steering Committee has a high level of respect, trust and camaraderie** among members and a good balance of individual strengths, expertise and access to resources that has proved effective in managing a full plate of activities. No new organizational representatives were added to the Coalition Steering Committee in this first program year, but new members representative of other constituencies, especially conventional agriculture and anti-hunger and food security groups are under consideration.

#### **New Capacity for Food Systems Change:**

18. **Grow Montana Coalition's engendering of new capacity for food systems change, in a short period of time and with limited resources, has been no less than heroic.** This report is replete with examples of social and intellectual capital that this fledgling Coalition has nurtured including:
- Attracting significant cash and in-kind resources. **The Kellogg Foundation seed money grant has been matched over 130% in cash resources alone in the program's first year of operation.**
  - **New and deepening cooperative relationships with government leaders and decision-makers.**
  - **Future leaders emerging to work on food systems issues. University of Montana graduate students contributed a good deal to Grow Montana efforts,** including: (1) the case study and "food miles" research; (2) implementation of the Missoula County Farm to School Program and (3) a needs assessment for the Poultry Producers Cooperative. Several continue to work in the food systems arena and bring to the Montana movement new leadership and fresh perspectives.
  - Creating an **organizational culture of reflection, learning and improvement.**

### **III. Evaluation Recommendations**

1. **Set the Coalition's policy agenda for the 2007 Legislature by August 2006 —** having it ready to shop around to potential allies and supporters at agriculture and other organizations' fall annual meetings. Continue to ground-truth policy options in the experience and knowledge of local business enterprises and community-based projects. **Make certain the Coalition's policy ambitions are in line with its resources, both human and financial.**

2. Allocate resources to build a diverse and solid political base for the Coalition. **This means turn up the fire on recruiting new members, allies and supporters and getting their formal endorsements and commitment of resources.** Set up and maintain the needed communications systems to keep all members engaged and informed.
3. **Ensure that the Coalition's legislative mix has something to appeal to each of its major constituencies,** i.e., food and agricultural producers, anti-hunger/food security and nutrition advocates, and economic development interests.
4. **Be more proactive and strategic in selecting sites and audiences for the nine remaining Community Workshops.** (To date, the Coalition has presented programs where it was invited.) AERO's extensive statewide network can assist in organizing and hosting these workshops once the Steering Committee has selected priority organizations and geographic areas. .
5. **Increase resources allocated to media and publicity in Year 2 of the program.** The Steering Committee should re-visit the draft Communications Plan and set strategies and priorities for communications efforts. **Develop policies and operating procedures for who can speak for the Grow Montana Coalition,** and in what venues, especially as the Coalition attracts members and moves into the 2007 Legislative arena.
6. **Consider adding a few (2 or 3) new partner organizations to the Steering Committee, especially representatives from more conventional agriculture and anti-hunger and food security groups.**
7. **Develop and employ an explicit consensus decision-making process** or agree to other ways to make decisions in specified situations. At times consensus decision-making may prove too cumbersome as Grow Montana adds new members to its Steering Committee and works in a heated legislative campaign.
8. **Share ideas, successes and setbacks regularly among the Kellogg state-level policy grantees around the country.** Let's not re-invent the wheel. The policies being developed by grantees can be used in multiple locations.

# Grow Montana Formative Evaluation Report

## January 1, 2005 – April 30, 2007

### I. Program Overview

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The Grow Montana coalition strives to create a food system that:

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**Objective #3:** Make the changes necessary to foster a more Montana-based food economy.

**This evaluation report is structured in the following manner.**

- I. Program Overview
- II. History and Context
- III. Evaluation Model and Methodology
- IV. Evaluation Findings and Recommendations (by question)
- V. Additional Thoughts by the External Evaluator
- VI. Appendices

## **II. History and Context**

In economic terms, agriculture remains Montana's number one industry and is still dominated by family-owned and operated farms and ranches, currently about 28,000 of them. In 2000, agriculture generated 36 percent of the state's income. Montana farmers and ranchers produce mostly low value, undifferentiated raw commodities for export, principally wheat, barley, and feeder calves.

Because of its economic and political origins as a colony rich in natural resources exploited by powerful out-of-state interests like the Anaconda Copper Company, Montana to this day tends to look to outsiders for economic salvation. As a result, Montana lacks ready access to venture and investment capital and suffers from a shortage of resident entrepreneurs.

Like many export-commodity-producing states, Montana lost most of its food processing capacity and infrastructure by the 1950s. Montana also lost the transportation infrastructure needed for local and regional distribution of Montana-produced goods. Montana's vast size and sparse population make creation of community-based enterprises and in-state distribution a huge challenge. Economies of scale in terms of processing and distribution are simply very difficult to achieve. An added hindrance to rebuilding Montana's food processing infrastructure is the fact that food sanitation laws and regulations are increasingly burdensome and inflexible for small-scale operations because they are designed for industrial-scale enterprises that are rife with contamination vulnerabilities.

Montana is a net importer of food, spending \$3 billion annually. Montana produces just under \$2 billion in raw agricultural products -- less than 8% of which are value-added into food for human consumption. This represents an opportunity for increasing the volume and value of Montana-grown food produced for in-state markets.

There are number of factors presently operating in Montana that are conducive to developing community-based food economies that will support the Grow Montana project these include: a new political climate led by Governor Brian Schweitzer, a farmer and soil scientist with a "can-do" attitude and aggressive focus on economic development and a shift in the political balance in the state legislature, with one house evenly divided between Republicans and Democrats, and the other with a Democratic majority. Also the president of the Montana State Senate is an organic grain grower (and the Democratic nominee for US Senate in one of the nation's most closely watched races). While partisanship is still a negative factor in the state, it is not as virulent as it has been, with both parties focused on economic development. Agriculture has suffered eight years of drought, and policymakers as well as community and agricultural leaders are ready for new ideas previously outside the conventional thinking of food crops as export commodities.

In addition, Montana is a leading state in acres devoted to organic crops. This is opening the eyes of state agricultural leaders to new opportunities beyond simply increasing production of conventional commodities and increasing commodity payments. There is a growing interest in agricultural practices that are rewarded with federal conservation payments and a recognition that federal farm policy must shift toward such payments. Among agricultural leaders in the state, there exists a backlash against any additional Free Trade agreements. And during the 2005 Legislative session, a coalition of agricultural and environmental groups passed country of origin labeling legislation.

The leadership of many of the major farm and commodity organizations in the state is getting younger. Alternatives to the NCBA-aligned Montana Stockgrowers Association have formed and are gaining influence: these include the Montana Cattlemen's Association and R-CALF.

While Montana's climate provides a relatively harsh and short growing season that limits seasonal variety, we are fortunate to have had a study done in the 1980s by Dr. Marcia Herrin and Dr. Joan Dye Gussow showing that Montana can, and indeed once did, grow a nutritionally complete, year-round diet. That study provides details on the specific food crops that can be grown in commercial quantities.

In recent years, Montana's active anti-hunger and nutrition interest groups have shifted their work from an emergency food system approach to food security making them strong allies of Grow Montana. The added concerns about obesity and diabetes, particularly among children and American Indians, have focused local and state policy leaders on school nutrition and nutrition on Montana's seven Indian reservations.

### **III. Evaluation Model and Methodology**

Grow Montana views evaluation as a methodology or process for continuous learning and program improvement. Employing the Learning Loop Model, developed by JoAnne Berkenkamp, Grow Montana's evaluation process provides a systematic approach to both assess and communicate the program's progress, outcomes, setbacks and learning. (See Appendix A: Learning Loop Model.) To ensure that these lessons and suggestions for improvement are owned and implemented by the program's leaders, Grow Montana has opted for a highly participatory evaluation process. An Evaluation Team (ET), composed of representatives of four of the partner organizations, the Project Coordinator and Director, and the external evaluation consultant participate in the evaluation planning, analysis and recommendations for change. (More detailed information about the ET can be found in the Evaluation Plan, Appendix B.) Evaluation data for this report was gathered with the use of eleven tools that can be found in Appendix C.

This Grow Montana evaluation report is **formative and spans a 16-month time period from January 1, 2005, through April 30, 2006**, although the W. K. Kellogg Foundation grant officially began in May of 2005. Grow Montana, the client of this evaluation, wanted to capture the learning and accomplishments of its policy efforts in the 2005 Montana Legislative session in this report. **Although the Grow Montana program includes legislative strategies and activities and this evaluation will document and assess their outcomes, no W. K. Kellogg Foundation funds have been used for lobbying communications or activities.**

The Grow Montana Coalition is currently composed of multiple partners, and each is engaged in food systems work in the state; however, this report will focus on the results of the collaborative program of work of Grow Montana. Consequently, several significant accomplishments of individual organizations will not be covered in this evaluation report. At times it is difficult to distinguish between which outcomes are directly attributable to Grow Montana and which to its partner organizations. This report focuses on those outcomes directly connected to Grow Montana, with the realization that in coalitional work there exist concentric circles of influence and impact.

#### **The primary "audience" for (or "consumers" of) this evaluation are:**

- The Grow Montana Steering Committee and its partner organizations.
- The W. K. Kellogg Foundation.
- Members and allies of the Grow Montana Coalition
- The Montana Department of Agriculture.
- Economic development agencies in Montana.
- Other funders of Grow Montana.
- Other organizations promoting localized food systems and sustainable agriculture.

### **The primary evaluation participants include:**

- The Grow Montana Steering Committee and its partner organizations.
- Participants in the statewide workshops where Grow Montana is presenting the findings of its food system research and helping communities explore local and state policy and project opportunities suggested by the research.
- Participants in the Governor's "Food, Farms and People" conference.
- Members and allies of the Grow Montana Coalition.

## **IV. Evaluation Findings and Recommendations**

The evaluation findings and recommendations are clustered by evaluation question as adopted by the Grow Montana Steering Committee, with the exception of Section A, which identifies a few overarching observations. The majority of the evaluation findings and recommendations were drafted by the Evaluation Team at its Assessment Workday (held in June 2006). Several are the observation of the external evaluator. ET members had the opportunity to review and comment on the second draft of this report. As the reader will note, a few evaluation questions are not addressed or are addressed incompletely because data is sparse or non-existent at this stage in the program. All the evaluation questions will be addressed in the summative evaluation report.

### **A. Overarching Findings:**

Several of the evaluation findings had an influence on all components and strategies of the Grow Montana project.

- 1. Grow Montana's vision for a Montana community-based food system is exciting and attracting support from a diverse set of constituencies across the state and has the endorsement of the Schweitzer Administration.** Economic development agencies, food security and nutrition advocates; conservation organizations, conventional and sustainable agriculture interests, and educational institutions, including Montana State University Extension, are seeing new potential for value-added agricultural economic development that can improve both the health of Montana's people and rural communities.

One tangible indicator of the excitement generated by Grow Montana is the flow of money and resources to this effort. **The Kellogg Foundation grant has been matched 130% in cash resources alone in the program's first year of operation.**

*"As a model for policy change, I don't think any group of partners has ever made this kind of progress in so short a timeframe and with so few resources. We've passed legislation and brought a whole new level of thinking to the Governor's Office, Montana Department of Agriculture, Department of Public Health and Human Services and conventional agriculture. It's the first time a food systems vision has captured the attention of political players who have the wherewithal to make change in Montana."*

Grow Montana Steering Committee Partner

- 2. The time-tested relationships between key leaders in Grow Montana, with their shared understanding and knowledge of food system issues in the state is a significant factor in the Coalition's immediate success.** Grow Montana is able to harvest the fruit of a tree planted and cultivated for nearly 15 years, beginning with

AERO's first Integrated Food and Farming Systems (IFFS) Kellogg Foundation grant in 1993.

3. **Momentum for Grow Montana's vision is building so quickly that the Coalition is having difficulty responding to the multiple opportunities becoming available, while still keeping the planned program components on track. Simply put, Grow Montana's human and financial resources are stretched to the limit.** At times the Grow Montana program appeared scattered, with no one partner or staff person able to focus and orchestrate the whole, resulting in some important activities slipping behind schedule as new opportunities took center stage. (This was especially apparent during the planning of the Governor's Food, Farms and People Planning Conference, in which a number of Grow MT partners and staff played a central role.) Coalition partners tended to focus on their specific segment of responsibility, while overall program integration and synergy suffered somewhat. Deciding priorities and focusing resources is a constant challenge for this highly participatory Steering Committee. **In Year 2, the Steering Committee will need to carefully plan, prioritize and focus the coalition's work, as well as raise additional resources. All new opportunities will need to be carefully weighed by the Steering Committee, employing a set of criteria as yet to be developed, before they are accepted into the Grow Montana program.**

## **B. Policy-Related Findings and Recommendations:**

***What policy changes, and/or progress toward desired policy change, resulted from the efforts of Grow Montana (directly and indirectly)?***

- a. *What policy changes were attempted, which secured and which not successful? Why?*
- b. *What policy changes were considered, but not selected? How did the Steering Committee apply its criteria? Who were policies not selected referred to? Why?*
- c. *What new opportunities did the policy changes create and for whom?*
- d. *What new barriers did the policy changes create and for whom?*

### **Findings: Accomplishments, Progress and Setbacks**

1. The Grow Montana Steering Committee (GMSC) **defined policy very broadly, including both private/corporate and public (local, state and national) administrative and legislative policy, and successfully worked at all of these levels.** The GMSC **established specific criteria to decide which policy options to pursue.** This screening mechanism has been and continues to be a helpful tool in making strategic decisions about where and how best to leverage policy change in Montana. As an example, Grow Montana does not work on GMO policy because it is such a contentious issue in the state.

#### **Criteria for Choosing Policies**

1. Will have significant impact.
2. Broadens our base of support.
3. Appeals to common sense.
4. Have needed resources.
5. Success likely.
6. Not politically polarizing.
7. Promotes sustainable, community-based economic development.

2. **Grow Montana experienced tangible success in its first year promoting food systems policy: (1) with the Montana Legislature and through administrative rulemaking; (2) with local governments and (3) with private and public institutions.** Here are the highlights:

a. Grow Montana led a **winning legislative campaign to allow state inspection of mobile meat slaughter units.** By simply changing the definition of "slaughter plant" to include mobile slaughter units, this new law opens doors for Montana's far-flung livestock producers who were otherwise limited to selling live animals at auction. Without the new law, Montana farmers and ranchers who wanted to sell to other Montana consumers had to transport animals to a state-inspected slaughter facility, which could be hundreds of miles away. By slaughtering animals on-farm with state inspection, farmers and ranchers can sell their meat at any Montana retail, restaurant, or direct market. Also, by reducing the stress of trucking on livestock, value is added with more humane slaughter. This legislation also allocated funds for two new inspectors to the Montana Livestock Department – one of the very few bills that passed with an appropriation. Grow Montana continued to bird-dog this new law through the Department of Livestock rulemaking process to ensure proper implementation.

b. Working closely with newly appointed employees at the Montana Department of Agriculture, **Grow Montana was able to expand the Department's interpretation of who is eligible for its Growth through Agriculture grants. This year nonprofits promoting food systems and agricultural were included as potential grantees.** Grow Montana, under the sponsorship of NCAT was successful in pursuing funding from this source for its recently completed study of the state public institutional food service markets and Montana agriculture's capacity to serve those markets. This grant includes funding for Grow Montana to present the study findings at 15 Community Workshops across the state and engage those communities in discussions about what the findings mean for their communities' opportunities, assets and challenges, and policy changes to address them.

Furthermore, Grow Montana nominated three potential candidates for two available positions on the Governor-appointed Growth through Agriculture Council. One candidate was selected: Dave Tyler, owner/operator (with his wife) of Thirteen Mile Lamb and Wool, a certified organic operation.

c. **Other internal policy and resource allocation changes at the Montana Department Agriculture:** (1) assigning an intern to research value-added incentive and support programs in other states; (2) participation by the Deputy Director on the organizing committee for the Governor's Food, Farms and People Planning Conference, a precursor to a full-blown Governor's Summit on Food and Agriculture next spring; (3) supporting the growth and development of farmers markets, including collaborating with two Grow Montana partners, AERO and Mission Mountain Market, on a USDA grant (the previous administration did not allow staff to work with farmers markets), and (4) agreeing to support legislative policy to fully fund the Farmers Market WIC /Seniors Coupon program.

d. The Grow Montana Project Coordinator serves on the Missoula County Community Food and Agricultural Coalition (CFAC), a local food policy council. In **May 2006, the Missoula County School Board unanimously passed a resolution supporting the Missoula School Food and Farm Project** (a farm to school and on-farm education program at the PEAS farm, a student-run organic Community Supported Agriculture farm). **This resolution clears the way for advocates of local food to promote programs to serve local food in Missoula County schools.**

- e. **The MSU Extension Service has approved its first agent's annual workplan that includes fostering community-based food systems, including both agricultural development and food security.** Grow Montana partners worked with this prominent agent, who is from a populous northcentral MT county, on the development of this workplan.
  - f. **The Montana Economic Developers Association (MEDA) created a Value-Added Agriculture Committee to develop key policy in this area.** Jan Tusick, a Grow Montana Steering Committee member was instrumental in encouraging MEDA in this direction. This MEDA committee is crafting legislative policy that will dovetail with Grow Montana's policy agenda.
3. One legislative policy effort of Grow Montana's that did not pass was HB 521, a bill designed to make it easier for Montana's public institutions to purchase Montana-produced food by instituting a voluntary 10 percent bidding preference on "Montana-grown or processed food." After passing the House Business and Labor Committee and a House Floor vote, HB 521 died on a tie vote along party lines in the House Appropriations Committee. **Grow Montana learned that incentives may be a better way to boost procurement of Montana-produced food in the 2007 Legislative Session.**

Although the preference bill failed to pass, it did provide an excellent opportunity to educate policymakers and persons of influence about the potential of institutional markets for Montana food producers and processors, and played a pivotal role in early identification of key allies for Grow Montana. **The policy debate on this issue prompted Grow Montana to seek funding for an institutional market study and assessment on what it will take for Montana producers to enter those markets.** Grow Montana was successful in getting the Montana Department of Agriculture to fund this research.

4. **The Grow Montana's 2005 legislative efforts could be characterized as opportunistic.** The Grow Montana Steering Committee was organized and it hired a lobbyist and policy researcher—all after the opening days of the 2005 Legislative Session. Bills were not as well researched nor allies identified and prepped as the Steering Committee would have liked, and several pieces of legislation that focused on hunger and low-income constituencies, such as expanding the Farmers Market WIC/Seniors Coupon Program, fell by the wayside. **Still, the Coalition's presence in the Legislature had a far-reaching outcome critical to the long-term goal of promoting community-based food systems policy in Montana,** including:
- Creating a new common-sense vision of agricultural-based economic development for Montana.
  - Initial awareness of Grow Montana as an entity and "brand" in the eyes of policy-makers and the public.
  - Bi-partisan support for Grow Montana's legislation. (Evidence that this Coalition can work on both sides of the aisle.)
  - A successful collaborative experience for members and allies in the Grow Montana Coalition.
  - Better understanding by Grow Montana of the research required to make its case to specific legislators and policy makers.

#### **Strategic Questions and Recommendations for Change Policy**

The Evaluation Team and the external evaluator have several recommendations that can enhance Grow Montana's policy success in the coming year.

1. Continue rigorously to research policy options and engage in discussions among Steering Committee partners while implementing its criteria to focus on specific strategic choices.

However, **the Coalition's specific policy agenda needs to be decided by August 2006 for the 2007 Legislature in order to have it ready to shop around to potential allies and supporters at agriculture and other organizations' fall annual meetings.** Furthermore, ET members voiced that a specific policy agenda for the 2007 Legislature would prove helpful in recruiting additional coalition members and allies. **Make certain the Coalition's policy ambitions remain in line with its resources, both human and financial.**

2. Allocate program resources to building a diverse and solid political base for the Coalition. **This means turn up the fire on recruitment of new members, allies and supporters and get their formal endorsements as well as a commitment of resources.** Set up and maintain the needed communications systems to keep them engaged and informed.
3. **Ensure that the Coalition's legislative mix has something to appeal to each of its major constituencies, i.e. food and agricultural producers, anti-hunger/food security and nutrition advocates, and economic development agencies.** A least one piece of legislation should deal with food security and hunger issues for low-income Montanans because it was left out of the 2005 legislative mix.
4. **Continue to "ground-truth" policy options in the experience and knowledge of local business enterprises and community-based projects.** A good example of the Coalition's learning from ground-truthing was their reframing of the institutional procurement issue as the "need to make it easier for institutions to buy Montana products," rather than "making it easier for Montana food producers and processors to sell to institutions." The latter was threatening to the institutions – one more regulation to adhere to.

### C. Accomplishments Other Than Policy:

*What accomplishments and outcomes other than policy, expected and unexpected, resulted from the efforts of Grow Montana?*

#### **Findings: Accomplishments, Progress and Setbacks**

Grow Montana had a number of significant accomplishments over the course of the past year that contributed to both policy and infrastructure development of a more localized food system. This report will focus on four major accomplishments: (1) The Governor's Food, Farms and People Planning Conference, (2) FoodCorps, (3) the Missoula County Farm to School Program, and (4) AERO's and Lake County CDC's support and assistance to local food enterprises. Several of these accomplishments were unimagined at the launch of Grow Montana, further demonstrating the Coalition's ability to take advantage of opportunities as they present themselves.

1. **The Governor's Food, Farms and People Planning Conference laid the foundation for cooperative policy change by a diverse and powerful set of stakeholders.** The Conference, attended by 65 key leaders (invitation only) from state government (i.e. Governor's Office and Governor's Office of Economic Development, Department of Public Health and Human Services, Departments of Agriculture, Commerce, Revenue, and Corrections); from the federal government (USDA Food and Nutrition) and from economic development agencies, anti-hunger and nutrition advocates; conservation organizations and conventional and sustainable agriculture organizations, began to create a new vision for Montana agriculture. **Grow Montana played a key leadership role in visioning, planning and executing the Conference, as well as identifying and inviting the "right" mix of participants.** Jonda Crosby of AERO and Nancy Matheson, Grow Montana Program Director were

leaders on the Conference organizing committee and Nancy Matheson gave a keynote address that portrayed the vision for a community-based food system in Montana. The desired outcomes for the Conference were to:

- Build relationships and community among the diverse constituencies.
- Create a common understanding of the problems and opportunities in Montana around the intersection of agriculture, hunger, and economic development (the Food System).
- Lay groundwork for a public policy agenda to address building a stronger economic and social fabric for Montana communities (to be further developed at the public Governor's Food and Ag Summit).
- Build momentum and commitment for Fall 2006 Governor's Food and Ag Summit.

**The Conference was an unequivocal success, exceeding the expectations of its planners. It brought together diverse interests that had never talked with each other about food, agriculture, economic development, hunger and rural landscapes and communities.** Governor Brian Schweitzer gave the keynote address and the Planning Conference was held in the State Capitol to further emphasize that this two-day meeting had the support and ownership of the administration and that the meeting's focus was on public policy.

Participants were asked to rate the **Governor's Food, Farms and People Planning Conference** on a number of criteria. Here are a few highlights. ("1" is the lowest rating and "5" is highest)

**Table #1: Conference Evaluation Data**

<b>Question</b>	<b>Average Rating</b>
This meeting was valuable to my organization.	4.64
The meeting gave me a better understanding of production and food access in Montana.	4.31
This meeting gave me ideas about possible food policy opportunities and changes that I can participate in.	4.06
I plan to attend the Governor's Food and Ag Summit if there is one.	4.8
I will recruit others to attend the Governor's Summit	4.8

*It worked! The challenge is that we must move forward with greater clarity about what are the intersections between food security and agricultural development and how do we take the enthusiasm and focus it on the intersections.*

**Conference Organizing Committee Member**

2. **Montana FoodCorps:** Grow Montana, in partnership with the Montana Campus Compact, **created the nation's first team of Americorps VISTA volunteers to work exclusively on developing farm to cafeteria programs at multiple institutions.** Beginning in July 2006 four VISTA volunteers will be working directly with food service directors and staff at three Montana institutions of higher education – Montana State University-Bozeman, Salish Kootenai College, a tribal college on the Flathead Reservation, and the University of Montana-Western at Dillon – to develop farm to college programs, building on the model created by the University of Montana-Missoula. A fourth Americorps VISTA volunteer will continue work on the pilot Farm to School program in Missoula County Public Schools. The volunteers will work to link Montana food producers, processors and distributors with these institutional food services to increase the amount of Montana-grown and processed food served in these institutions, and thereby boost Montana's health and economy.

**Example activities for Americorps volunteers include:**

- Research potential vendors and coordinate deliveries.
- Develop databases of Montana-grown foods.

- Organize special events.
- Conduct community and campus outreach, such as teaching classes, developing educational materials, or working with community partners.
- Leadership training and experiential learning for young professionals interested in food systems work.

Each Americorps volunteer will serve for one year and host sites will have the opportunity to renew the position for up to three years. **The FoodCorps program will enable Grow Montana to expand its reach and resources in influencing the purchasing patterns of four major public institutions, as well as to "pilot" and evaluate a new partnership with Americorps VISTA that can be duplicated in other regions of the country.**

3. **The Missoula County Farm to School Program:** Although much of Grow Montana's efforts are focused at the state level, **the Coalition is committed to fostering local models as pilots for grassroots efforts. One important model is the Missoula County Farm to School program, an entry into improving the quality and nutritious value of school lunches by serving local food.** Grow Montana assisted the Community Food and Agriculture Coalition (CFAC), a food policy council in Missoula County, on this program. The Grow Montana Project Coordinator supervised two University of Montana Environmental Studies graduate students at the Missoula County Public Schools at the inception of its pilot farm to school program. Beginning July 2006, a FoodCorps volunteer will take over the role of these two students as the program moves into its next phase under the supervision of the CFAC.

This program offered students, parents, and food service workers the opportunity to participate in a variety of local food-related events including: 1) school lunches that featured Montana grown food; 2) taste testing, giving elementary students the opportunity to experience freshly grown produce before seeing it in the cafeteria meal line and learn about health benefits of each food item and how it is grown; 3) farm tours of the University's PEAS farm, and 4) kitchen tours of the Missoula County central kitchen. In addition the program created an Educational Resource Guide that provide educators, community members, and parents with a "toolkit" of information, activities and resources to encourage youths' understanding of the benefits and joys of eating locally. In addition to student education, the Farm to Cafeteria Program connected MCPS food service staff to several Montana farmers and other food vendors, leading to additional local food procurement beyond special meal event purchasing.

4. **The University of Montana-Missoula Dining Service's commitment to purchase locally grown and processes foods since 2003 reached the \$1million mark in early 2006.** Although this milestone cannot be directly attributed to Grow Montana collective efforts, the Coalition has continued to nurture, publicize and use this program as a model for other public institutions. This milestone was celebrated on May 4<sup>th</sup> with a daylong community event, *UM Farm to College Program: Celebrating Sustainability in Action*, attended by members of the public and at least four state legislators.
5. **The Grow Montana Coalition strongly believes that sound policy development and implementation must be grounded in the needs of the key players in Montana's food system.** Grow Montana partners, AERO and Lake County CDC have helped to create and support the businesses and enterprises that can both ground-truth policy proposals and create supply and needed infrastructure for Montana's nascent community-based food system.

AERO created a peer network of local enterprises, the Montana Buy Fresh Buy Local Network (BFBLN), and a small granting program to provide support to these grassroots efforts. The BFBL network met in the spring of 2005 and 2006 to share their successes,

challenges and to create plans for the coming year. AERO staff nurtures the relationships among network members, as well as provides phone coaching. To date there are 13 active local groups in this loose-knit network. These local enterprises include a poultry producers cooperative, an on-farm youth education program, new retail food co-ops in Missoula and the Bitterroot Valley, and a newly formed producers union, HomeGrown Roots. (Grow Montana's Year One Indicator of Success was 20 active groups in BFBL network.)

Lake County CDC, Mission Mountain Market Food Enterprise and Processing Center has provided direct consulting and technical assistance to 12 business or cooperative enterprises that can supply Montana's community-based food system, including: Montana Natural Beef, LLC; Amazing Grains Cooperative; Great Northern Growers Co-op; Western Montana Growers Co-op; Brentari's Salsa Creations; Orchard at the Flathead; Tipus; Flathead Lake Winery; Montana Poultry Growers Co-op; two retail food co-ops and Flathead Native Ag Co-op. (Grow Montana's Year One Indicator of Success was 10 organizations would receive consulting assistance from the Lake County CDC.)

Many of these food entrepreneurs and activists have participated in the development of Grow Montana's policy options formally, through Community Workshops (see page 16 and 17 of this report) and informally, by working directly with AERO and Lake County CDC staff, who are able to provide them with assistance. Creative ideas for policy changes, and a window as to how these changes might look on the ground have significantly influenced the Grow Montana Steering Committee's thinking and conversations as they craft policy options and priorities.

#### **D. Research, Communications, and Outreach**

*How effective were the research and outreach/communications strategies employed by Grow Montana in generating new understanding, interest and support for a community-based food systems policy and action priorities from a diverse group of stakeholders?*

#### **Findings: Accomplishments, Progress and Setbacks**

##### **Research Findings:**

- 1. Grow Montana embarked on two major research efforts this year, a case study analysis of the University of Montana's (UM) Farm to College Program (FTC) and a public institutional food service market assessment. Both studies are of high quality and the data being generating is proving valuable to the development of the program's policy agenda.**

The public institutional food service study is intended to be a complement to a study of the impact of the University of Montana's Farm to College program on the state. The in-depth case study is focused on the social, economic, and transportation-related environmental benefits and challenges associated with the UM Farm to College program. The analysis of UM's Farm to College program will reveal what is working well in the program for particular types of vendors participating in it, as well as areas in need of improvement. By contrast, the public institutional food service study takes a broader view of institutional markets. The FTC was an original component in the Kellogg Foundation grant, while the public institutions food service study grew out of a need for additional research following the defeat of the 2005 procurement legislation.

Unfortunately, both research projects fell behind schedule and were not published by April 30<sup>th</sup>, the end of the program year. (The release date for both studies is now set for September 2006.) The delays didn't significantly deter the Steering Committee's development of policy options because the data generated in the working drafts were

solid and information could be pulled for presentations, Community Workshops and Steering Committee policy discussions. Media attention generated by the formal release of the studies is yet to be realized.

**a. The Public Institutional Food Service Market Assessment, Unlocking the Food Buying Potential of Montana’s Public Institutions: Towards a Montana-based Food Economy:**

Grow Montana contracted with KiwiTB to conduct the research, and economic consultants Dr. Fraser McLeay and Dr. Nicola Barrons authored the study. The objectives of this study were to analyze the current market status of Montana’s public institutional food services; build projections for growth in the value, volume and diversity of Montana food products that could enter that market; and develop recommendations for changes needed to realize that growth potential. More specifically, this report provides:

- An assessment of the current and potential value and volume of Montana’s public institutional food service market for Montana-produced food.
- An assessment of the current and potential food production, processing and distribution capacity for serving Montana’s public institutional food service market.
- Recommendations and a summary of the next steps that could be taken to enhance local food supply chains in Montana.

Personal interviews were conducted with approximately 30 institutional buyers to determine the opportunities and constraints associated with purchasing Montana grown and processed food. Producers and processors of Montana-grown food who could potentially supply the institutional food service market were surveyed via personal and telephone interviews. Supply related opportunities and barriers were identified.

**b. The Case Study Research on UM’s Farm to College Program:**

The University of Montana-EVST faculty and students (team of University of Montana Environmental Studies graduate students under the supervision of Dr. Neva Hassanein), working closely with other project partners developed a replicable design and process for assessing the economic, social and environmental contributions of an existing regional food-system in Montana and the value-chain that links them. A successful local food system, the Farm to College Program at the University of Montana, was selected as the case study. The research explored these questions:

- What are the social and economic relationships involved in the functioning of the food supply chain associated with UM’s FTC?
- What are the principal social, economic, and transportation-related environmental benefits and challenges associated with this food supply chain?
- What policy changes and/or project initiatives might increase or enhance the benefits and overcome the challenges?

FY 05 (July 1, 2004 – June 30, 2005) was selected as the study period because University Dining Services data was most complete and reliable. Forty-two vendors sold to FTC in FY 2005, making up approximately 13% of the total UDS food purchases in terms of dollars. Purchases from individual vendors ranged from \$24 to over \$148,000 in FY 05.

The case study research methodology included:

- 9 in-depth interviews with University Dining Services staff.
- 23 phone interviews with vendors who have sold at least \$250 or more of food to the UM Dining Services.

- 8 in-depth face-to-face interviews with vendors (Bausch Potatoes, Meadow Gold Dairy, Mexitana Tortillas, Montana Natural Beef, Montola Growers, SYSCO Montana Western Montana Growers' Cooperative (2 interviews) and Wheat Montana).
- An extensive literature review.
- A dot survey with Dining Service consumers. The dot survey sheets were posted outside of the main dining hall on campus during the dinner hour, when typically over 800 people come through a door. The survey received a 78% response rate.

Students gained a great deal from this research effort, increasing their knowledge of community-based action research and foods systems, as revealed through their comments:

*"The process is useful for understanding how to do community development work and team building."*

*"Every time I eat I think about where it came from. I think about that process – the research process made me more conscious."*

*"The research process helps build trust in the university, that academics are not just interested in their own thing."*

Graduate students also conducted a food miles study of a year's supply of ingredients in a hamburger and fries meal – comparing the Farm to College meal to one conventionally sourced. **The study was pioneering because it compared real food and actual miles, not a hypothetical case, and also estimated greenhouse gas emissions for both scenarios.**

## 2. **Grow Montana also conducted several smaller research projects to aid in its understanding of the Montana food system and policy development needs.**

These included:

- A legal analysis of Montana's current cooperative association law and structure to determine any legal and/or policy barriers to developing producer cooperatives.
- Policy options and analysis from other states and their applicability to Montana.
- A feasibility study to document the need for and use of a mobile chicken-processing unit in Western Montana.
- A study of Montana's food procurement laws and regulations -- the barriers they present and the potential for policy changes to increase opportunities for Montana vendors.
- A study of Montana's meat slaughter and inspection laws and regulations.

### **Communications: Framing and Re-enforcing the Message Findings:**

## 3. **Grow Montana's message is powerful and engaging.** Using an economic development frame, elaborated by the operating principles listed below, has proven to be a message that appeals to Montanans. Grow Montana talks about a food system for the state that:

- Creates the means for more of Montana's food and farm products to be used closer to home.
- Retains more of the value that's added to our agricultural products in Montana communities.
- Improves all of our citizens' access to healthy, nutritious food.
- Reconnects Montana's rural and urban economies.
- Enhances stewardship of Montana's natural resources.

Grow Montana continues to refine and tailor its message as it learns from experience, presenting it to new audiences and interests.

4. **Grow Montana' strength is in making personal connections and sound working relationships with other organizations and agencies.** Grow Montana's leadership in the Governor's Food, Farm and People Planning Conference demonstrates this finding. The Steering Committee partners have excellent interpersonal communications skills, passion for the issue and a cooperative style of leadership.
5. **Grow Montana appears less skilled in creating systematic communication feedback loops that continue to reinforce individual and organizational engagement.** Once individuals and organizations make the contact with Grow Montana and are interested in learning more and getting involved, it's not apparent where they go next. For example, Grow Montana's website are not linked to all its partners and vice versa. Grow Montana's printed materials do not direct people to action and more engagement. Interested audiences, specifically those participating in Community Workshops, are left hanging with no specific direction of what to do next.

#### **Outreach and Education Findings:**

6. **Six of the 15 Community Workshop, conveying the results of the public institutions food service market assessment, engaging participants in a discussion about policy opportunities and barriers, were conducted in this program year.** (The goal was to conduct 15 by July 2006.) Because the institutional market study report was not published, Steering Committee presenters were required to pull data, slides, and recommendations from the draft findings and participants did not receive a printed Executive Summary of the study. **Even with these barriers workshop discussions were lively, participants demonstrated excitement and a diverse list of policy options was generated.** One presenter observed, *"The questions were excellent and the Q and A section continued for 30 minutes, double the time we were allotted on the Extension meeting agenda."*

The Steering Committee chose to first test its presentation and policy discussion process with a few "friendly audiences" – the AERO Buy Fresh Buy Local Network annual gathering and three regional (Bozeman, Great Falls and Missoula) AERO Agriculture Task Force meetings. The fifth Community Workshop was given to the Central Area MSU Extension Agents, representing 1/3 of the state's 56 counties in Conrad, MT, and the sixth workshop was the Governors' Food, Farms and People Planning Conference. The Steering Committee, working with the external evaluator, assessed, refined and sharpened the workshop process and content and developed an agenda template and protocol for future Workshops.

7. Grow Montana Coalition members have presented information about Grow Montana and its vision for Montana agriculture and food systems to **over 25 Montana organizations and public agencies** including: Montana Stockgrowers Association, Montana Economic Developers Association, Sustainable Business Council, Women's Voices for the Earth, Montana Farmers Union annual meeting, Montana Organic Association annual meeting, Lieutenant Governor and his staff, Hunger Free Missoula, the Ag Expo Banquet held at UM Western, Dillon (Grow Montana gave the closing keynote) and Montana Cooperative Development annual meeting. A well-written fact sheet describing the Grow Montana Coalition's purpose, successes and objectives accompanies these presentations. Also, **Grow Montana has developed a set of PowerPoint slides and presentation templates** so that partners and allied groups can easily develop a presentation tailored to the needs and interests of their audiences.
8. Grow Montana Coalition has launched both public and intranet websites. The intranet site houses internal communication between Coalition partners and members, including

Steering Committee meeting notes, the database, public policy research, etc. while the public site includes general information about Grow Montana.

**The public website has not been well marketed and therefore is not yet well used by the general public.** (Once the case study and public institutions market studies are on the website Grow Montana anticipates more traffic.) Also, Grow Montana's website needs better links to partner organization websites and vice versa, as well as specific avenues that enable interested people and organizations to connect and engage in the Coalition's efforts.

**Although the intranet website is designed to communicate information between the partner organizations, it is not well used.** Steering Committee members tend to communicate through email. More importantly, the database system for tracking contacts with interested individuals and organizations over time, an Oracle database system, is operational on the intranet site, but little to no information has been entered as yet. **Grow Montana needs to build its collective database that describes and shares content and follow-up information among its partners to enhance policy, communications, and outreach work.** (Grow Montana is currently using AERO's database which contains primarily contact information.) The importance of creating and maintaining a shared information management system must be emphasized with the partners. Training for partners is needed as well as a firm deadline for entering past contact information and a process and timeline for continual updating. This internal communications system will be essential for an effective legislative campaign.

#### **Montana Media Findings:**

9. **Grow Montana has had limited exposure in the Montana media**, even though spreading its vision for a new agricultural economy and making it seem possible by publicizing examples of community-based enterprises, has been articulated as a high priority strategy of the GMSC. Though media coverage often deals with local food issues, it does not mention the Grow Montana Coalition, resulting in a lack of name recognition, outside the leaders of organizations, agencies, and state policymakers with whom Grow Montana works directly. Coverage in the standard Montana press has been limited to the Missoula, Great Falls and Helena dailies. Of the six significant articles, four were in the Missoula paper. Weekly papers have not been utilized, and Grow Montana has not been featured in the eastern Montana press.

**Radio coverage has been a bit more promising.** Brian Kahn, a Grow Montana Steering Committee member, hosts the "Home Ground" radio talk show on Montana Public Radio where five programs have been devoted to local food systems. (The non-summer listening audience for each show is around 25,000 to 30,000 households.) Guests discussing these issues have included: Governor Brian Schweitzer, Nancy Peterson, Director of the Montana Department of Agriculture and Neva Hassanein and Mark LoParco, the head of UM's Dining Services. AERO has aired two KUFM Commentaries (Missoula-based public radio), one specifically on "Grow Montana: A Model of Food and Agriculture that Benefits Us All." Grow Montana has not received television coverage.

AERO regularly covers Grow Montana's progress in its quarterly Newsletter, the *Sun Times* and has distributed 6,000 copies of *Abundant Montana*, (a directory in which consumers can find local and sustainable food,) to all Montana libraries, churches, natural food stores, Extension and NRCS offices as well as Chambers of Commerce.

#### **The ET members discussed reasons for limited activity in this area:**

- Too many other obligations and activities competing for time. Once an activity is completed it's on to the next, leaving no time and resources to publicize the work.

Also, no one specifically is assigned communications responsibility and allocated the time and resources to focus on this strategy.

- Review of media releases by the Steering Committee is cumbersome and time consuming, and newsworthiness has passed. Who speaks for the Coalition is still an issue to be decided by the Steering Committee.
- A draft communications plan was developed and commented upon by Steering Committee partners, it has not been finalized, nor have responsibilities been allocated to different partner groups.

### **Strategic Questions and Recommendations for Change for Research, Communications and Outreach**

- 1. The Grow Montana Steering Committee should be more strategic and proactive in its selection of sites and audiences for the 9 remaining Community Workshops.** (To date, the Coalition has presented where it was invited.) An effort should be made to engage more mainstream agricultural organizations in the workshop discussion, particularly before the 2007 Legislative Session. AERO's extensive statewide network can assist in organizing and hosting these workshops once priority organizations and geographic areas have been identified by the Steering Committee.
- 2. Community Workshops will likely continue throughout the two-year life of the program. The Steering Committee will need to alter somewhat the content of its Community Workshops as the Legislative Session nears.** Workshop policy discussion will focus more on educating participants about the bills, informing them how they might get involved and discussing what might be the bills potential impact on them. The conversation should turn to identifying other non-legislative policy options that can be accomplished between sessions. The institutional market assessment and the case study research should be presented as a package and the results of the Governor's Food, Farms and People Planning Conference and full Summit should be emphasized as well.
- 3. Grow Montana should consider increasing the level of resources allocated to media and publicity in Year 2 of the program.** The Steering Committee should revisit the draft Communications Plan and set strategic priorities for communications efforts. Use Kellogg Foundation media resource person, Nicole de Beaufort, to assist with priority setting and strategy. (Note: plans are underway to hire two contractors to work exclusively on media and publicity. NCAT has also acquired new communications personnel in Butte who have the ability to assist Grow Montana.)
- 4. The Grow Montana Steering Committee should consider the following priority areas, identified by the Evaluation Team, for media attention in the coming year:**
  - Media follow-up from the Governor's Food, Farms and People Planning Conference that builds public interest and excitement for the full public Governor's Summit scheduled for March of 2007.
  - A media and publicity strategy and plan for release of both the public institution market study and the Farm to College case study in September 2006.
  - More mention of the Grow Montana Coalition in all publicity and media releases.
  - The launching and progress reports of the FoodCorps with focus on each site and the work that is being accomplished.
  - On-going media stories that feature on-the-ground success stories of local entrepreneurs who are contributing to Montana's food system.

5. **The Grow Montana Steering Committee needs to develop policies and operating procedures that authorize who can speak for the Grow Montana Coalition, and in what venues,** especially as the Coalition attracts members and moves into the Legislative arena.

## E. Effectiveness of the Coalition and its Leadership

### *How effective has Grow Montana been as a coalition in advocating its policy agenda?*

- a. *Who joined the coalition? How diverse a mix of organizations is it? Is it the "right" mix? Any key constituencies missing?*
- b. *How well have coalition members, at all levels, worked together to achieve the coalition's outcomes? How satisfied are members with their coalition experience? What worked well? What proved divisive?*
- c. *How effective were communications between and among Steering Committee, coalition members and allies?*
- d. *What has the Steering Committee learned about how to organize and maintain a vital policy coalition over two years?*
- e. *What areas need improvement?*

## **Findings: Accomplishments, Progress and Setbacks**

### **The Membership**

1. **Although Grow Montana Coalition's formal membership did not expand beyond its original Steering Committee partners this year,** formal affiliation is only one indicator of support and commitment. (The membership target was 8 addition organizations beyond the Steering Committee partners.) Grow Montana's two bills in the 2005 Legislature were lobbied for by a diverse group of organizations including: the Grain Growers, Farm Bureau, large Montana-based processors (Wheat Montana, Cream of the West), Montana Department of Agriculture, Northern Plains Resource Council, to name a few. Furthermore, interests represented at the Governor's Food, Farms and People Planning Conference see themselves allied with Grow Montana, but have not formally become members.
2. **The Grow Montana Steering Committee has created a membership structure and a recruitment plan.** The barrier to organizations joining Grow Montana appears to be lack of Steering Committee member follow-up and persistence to "close the sale." The lack of follow-up is the result of too many competing work commitments by Steering Committee member groups and some hesitancy to ask groups to join. Several partners have articulated that Grow Montana does not have a specific policy agenda and tangible membership benefits, and these are membership barriers. Others saw the lack of staff reminders and pressure on partners to meet their recruitment obligations, as the problem. **The partners identified that building Grow Montana Coalition's diverse political base is essential for effective policy change, with an immediate priority being an effective way for groups to affiliate formally with the Coalition.**

### **The Steering Committee:**

3. Grow Montana Steering Committee members were surveyed by the external evaluator to identify member satisfaction in the areas of communications, decision-making and new member representation. The survey also identified a number of strategies for improving the effectiveness of the Steering Committee's work. **Overall, the survey results identified a high level of respect, trust and camaraderie among members. All felt that they were valued and appreciated for what each brings to the Steering**

**Committee. The current Grow Montana Steering Committee has a good balance of individual strengths, expertise and access to resources** that has proved effective in managing a full plate of activities.

Partners were asked to rate the level and quality of communication on a five-point scale where "1" is poor, "3" adequate and "5" outstanding. **The average rating for level of communication was a 3.7 and quality of communication as a 4.1.** Partners commented, *"I remain surprised at how responsive and communicative partners are" and "Steering Committee partners have good relationships and are good at communicating."* **Partners rated the quality of decision-making as a 3.1,** and identified the need for more structure and stronger facilitation in meetings. One partner commented, *"Steering Committee meetings are healthy meetings among people getting to know each other, but these are business meetings and need more focused deliberation."* Furthermore decisions are made by "consensus" although there is not an explicit consensus process. Partners have commented, *"It isn't always clear what we are making joint decisions on" and "We are not digging in and making the hard decisions. We make allowances because we are all friends. We look into each other's lives and know how hard each of us is working on a number of levels. So we don't always give honest feedback that could lead to making the difficult decisions."* Partners agreed that if other members are added to the Steering Committee, the decision-making process might need to be more formal and explicit.

- 4. No new organizational representatives were added to the Coalition Steering Committee in this first program year.** Several partners felt this was a prudent strategy in the Coalition's beginning phase, but new Steering Committee members representative of other constituencies, especially conventional agriculture and anti-hunger and food security groups need to be present to incorporate a diversity of interest and support.

### **Strategic Questions and Recommendations for Change for the Coalition and its Leadership**

- 1. A good plan was developed for membership recruitment that divided contact and recruitment responsibilities among the partners. Go forth and implement the plan with vigor.** Grow Montana should not alter this plan until all partners have put energy and time into trying it out. Partners should be encouraged to "close the sale" at whatever level of engagement each organization will agree to. (The membership plan has several levels for affiliation from full member to supporter of specific policies.)
- 2. Consider adding a few (2 or 3) new partner organizations to the Steering Committee, especially representatives from more conventional agriculture and anti-hunger and food security groups.** As mentioned above, be sensitive to their entry into this tight-knit group of Steering Committee members. Be open to creating new policies, procedures and operating styles that fully engage new members. Also consider other avenues for engaging future Grow Montana Coalition members in policy development.
- 3. The Steering Committee member survey offered a number of suggestions for enhancing the effectiveness and efficiency of the Steering Committee's work together.** The suggestions arising most often included:
  - Meet in person monthly in the second year of operation. Meetings should be well structured with specific objectives and a list of decisions to be made. In addition to an in-person meeting, hold one conference call per month that focuses on one major agenda item.

- Staff should provide more regular up-dates to Steering Committee partners. A weekly email update that takes no more than 15 minutes to prepare and 5 minutes to read is preferable.
- Re-visit the tasks each partner has taken on to ensure: 1) the task is truly a Coalition priority and 2) the Coalition is using its human resources most wisely, taking best advantage of the strengths different people and organizations bring to the work.
- Consider hiring NCAT to handle more administrative and clerical functions, in particular maintenance of the Grow Montana database and website.
- Develop and employ an explicit consensus decision-making process or agree to other ways to make decisions in particular situations. Consensus decision-making may prove cumbersome in a heated legislative campaign.

## F. New Capacity for Food Systems Change

*What new longer-term capacity (new leadership, organizational structures, working relationships, financial resources, political cachet, knowledge, new tools and models, public support, etc.) has been developed by this Grow Montana effort? What foundation has been laid?*

### **Findings: Accomplishments, Progress and Setbacks**

1. **Grow Montana Coalition's ability to garner new capacity for food systems change, in a short period of time and with limited resources, has been no less than heroic.** This report is replete with examples of social and intellectual capital that this fledging Coalition has nurtured. This section will highlight key examples of new capacity that the ET saw as most significant to both accomplishing the program's goal and objectives and laying the foundation for longer-term food systems change.

### **Financial Capacity:**

- a. Grow Montana has been able to attract significant cash and inkind resources. **The Kellogg Foundation seed money grant has been matched over 130% in cash resources alone in the program's first year of operation.** Specific matching funds are as follows:

**Table #2: Matching Resources**

<b>Cash Sources of Funds</b>	<b>Amount \$</b>	<b>Inkind Sources</b>	<b>Amount Inkind</b>
M. Stranahan	41,750	Staff Labor: Lake County Community Development	14,653
MT Department of Agriculture	59,824	Staff Labor: University of Montana EVST	18,397
Stranie Ventures	68,740	Staff Labor: Artemis	6,800
Kathleen B. Taylor	50,000		
Farm Aid	5,000		
Patagonia	1,500		
MT Ag Innovation Center	2,000		
Jerry Metcalf Foundation	5,000		
Montana Food Bank Network	4,800		
MT Dept of Health & Human Services	3,600		
<b>Total Cash</b>	<b>\$242,214</b>	<b>Total Inkind</b>	<b>\$39,850</b>

**Steering Committee partners have taken the initiative to raise the funds needed to run an effective program.** As one Steering Committee member put it, *"the initial nod from Kellogg helped to create the nods from other sources –helping them to see a credible program, with good people and lack of cash."*

### New Relationships and Political Access

- b. Grow Montana initiated and deepen cooperative working relationships with governmental administrative leaders and decision-makers, most notably:** (1) The Governor<sup>1</sup> and his Office of Economic Development, (2) Montana Department of Agriculture, (3) Livestock Department, (4) Department of Public Health and Human Services, (5) Department of Administration, and (6) Office of Public Instruction. Deputy Director level departmental and Governor's Office staff served on the Governor's Food, Farms and People Planning Conference organizing committee along side Grow Montana partners. Also, a number of key relationships have been built with legislators interested in sponsoring Grow Montana bills, **attracting attention and support from both Republicans and Democrats.** Two state legislators, one Republican and one Democrat, were selected by Grow Montana to add a National Association of State Legislators conference on Farm to Cafeteria programs held in Seattle.
- c. Grow Montana made significant headway in framing food systems and agricultural issues in language that resonates with a diverse group of constituencies and policy makers. Grow Montana has a vision and message that has appeal to Montanans.** It has created the dialogue and initiated the working relationships between agriculture (both conventional and sustainable) organizations, economic development agencies, state government, anti-hunger/food security advocates, environment organizations and nutrition advocates. **These constituencies have never sat at the same table, much less understood their common interests, nor have they seen the potential benefits of collective action.**
- d. Grow Montana helped strengthen relationships among the University of Montana Dining Services** (local purchases reached the \$1 million mark in April 2006) **with Montana food producers, processors and distributors.** University Dining Services is in conversation with Mission Mountain Market about purchasing carrot-processing equipment to enable their suppliers to meet their specifications, as well equipment to make fajita strips.
- e. Grow Montana developed stronger ties** (particularly through AERO) **with farmers markets across the state that will prove valuable in promoting policy that expands the Farmers Market WIC/Seniors Coupon program.**

### Knowledge and Understanding:

- f. The Steering Committee learned a good deal about the Montana Legislature, both its formal and informal process through the Coalition's 2005 policy work.**
- g. The Grow Montana Steering Committee has gained a broader and deeper understanding of the complexity of Montana's current food system and a more realistic understanding of the challenges it faces in creating community-based alternatives.** The public institutions market assessment, the case study research on UM's Farm to College value chain, the survey of other state policies options, and the outreach and consulting to grassroots enterprises and community projects collectively brought home this realization to the Grow Montana Steering Committee. Furthermore,

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<sup>1</sup>It is interesting to note that Montana's Governor, Brian Schweitzer is a ranch and soil scientist who is well versed in agriculture.

three new research models were designed and implemented -- all of which can be used by other Kellogg grantees and food systems advocates.

### **Structures and Infrastructure:**

- h. Grow Montana and its individual partner organizations have created, nurtured and learned from new producer cooperatives that will be able to build local supply and distribution systems necessary to serve larger markets and handle the increased demand for locally produced and processed foods.** The Western Montana Growers Cooperative and the Montana Poultry Growers Co-op are two examples.

### **Leadership:**

- i. University of Montana graduate students contributed a good deal to Grow Montana efforts,** including: (1) the case study and food miles research; (2) implementation of the Missoula County Farm to School Program and (3) a needs assessment for the Poultry Producers Cooperative. Students in the case study research project not only produced a quality product, but also developed action research skills and interest in food systems work. **Several are continuing to work in the food systems arena and bring to the Montana movement new leadership and fresh perspectives.**
- j. Grow Montana has cultivated a culture of reflection, learning and improvement.** The Evaluation Team, created to lead the evaluation of this program, is working effectively and providing the feedback loop needed for learning and program improvement. Their collective analysis and interpretation of the evaluation data has caused them **to ask the difficult questions, take corrective action and bring new ideas and recommendations to the Steering Committee for their discussion and decision making.**

## **G. Lessons Learned**

### ***What were the key lessons learned by Grow Montana in effecting food systems change in Montana?***

- a. How has this effort influenced the Steering Committee's starting assumptions about the promise of Montana-based food systems change?*
- b. What has Grow Montana realized about its theory of change?*
- c. What are the next, logical steps in creating community-based food systems and a vital agricultural economy for Montana?*

### **Theory of Change:**

The Grow Montana Coalition believes that community-based food systems change is likely in Montana if it successfully executes these steps:

- Arms itself with the research and information to make a credible case for bringing regional food and agriculture to the center of Montana's economic development policy, particularly the economic, social and environmental contributions of existing components of Montana's emerging regional food system, and what it will take to create "more of it."
- Builds a broad base of political support from a diversity of interests and sectors, both rural and urban, who are concerned about food, agriculture, energy and Montana's sound economic future.
- Identifies, through on-the-ground action, policy barriers to and opportunities for development of the infrastructure needed to support local and regional food systems.

- Works to secure policy changes identified through our on-the-ground activities and the experience of our broad coalition by drawing on the power of coalitions to influence policymakers and mobilize citizens.

Underlying these four strategic steps are a number of assumptions and beliefs held by Grow Montana leadership. What follows is not an exhaustive list, but includes those beliefs most apparent at this juncture and are agreed upon by the Steering Committee members.

1. Montana agriculture and rural communities are desperate for effective and sustainable economic development strategies.
2. Public policy (local to international) greatly influences the agricultural business and economic climate in our state.
3. A community-based food system, where food is grown, processed, distributed and consumed in Montana, is a promising, yet long-term vision, for rural economic development.
4. Public institutions are significant food consumers in Montana and a good potential market to begin Grow Montana's efforts.
5. Issues of food safety, access and environmental impact are all necessary elements to consider in sound agriculture and food policy.
6. Research and analysis of the social, political, economic and environmental outputs and impacts is a critical first step in developing sound food systems change.
7. Research and analysis must be ground-truthed by people working at the grassroots level in order to create a truly community-based food system for Montana.
8. People engage in policy change efforts when they encounter barriers to their enterprise or goal and are able to articulate policies (both public and private) that could help alleviate the problem.
9. Change occurs most readily in places where momentum or lift are beginning to occur (rather than places where forces need to be stopped and re-directed.) Grow Montana plans to take full advantage of these openings or places of lift.
10. Food systems change provides the common ground where otherwise divergent organizations and constituencies can meet and create a shared vision and action.
11. The key to policy success in Montana is to create and activate a diverse coalition where political muscle can be applied from a number of different directions. The Grow Montana coalition will include, but not be limited to: (1) conventional and sustainable farm organizations; (2) health, human service and nutrition constituencies; (3) eaters who share our values; (4) economic development agencies; (5) conservation organizations; (6) policymakers at all levels and (7) private businesses and entrepreneurs.

### **Findings: Accomplishments, Progress and Setbacks**

1. The Grow Montana Evaluation Team reviewed these assumptions at its June daylong analysis meeting. The ET noted that their assumptions were further reinforced by the formal and informal discussions at the Governor's Food, Farms and People Planning Conference. **The ET agreed that these assumptions continue to hold true after a year of program implementation, although the emphasis has changed for a few described below. No new assumptions and beliefs were added.**
  - a. Evaluation Team members experienced the value and importance of ground-truthing research, analysis and potential policy options with people working at the grassroots level (Assumption #7). As one Steering Committee member commented, *"We were on the mark with that assumption. You can't expect policy to work unless it comes from the people who it will impact."*

- b. ET members articulated that they might have been too optimistic about the ease of local food entering public institutional markets (Assumption #4). Public institutions are not the “low hanging fruit” the Steering Committee initially assumed. Also, this market alone was not as significant as originally anticipated, but for food producers and processors it can be an important stepping-stone in developing the capacity to enter other markets.

Grow Montana did not fully understand the scope of the research, much less the limits of the results it could generate with the resources at hand. The research did give the Steering Committee a better understanding of the complexity of the market, its size and limits to access and a few good leverage points. It also documented the dearth of processing and distribution infrastructure necessary to serve this and all other food serve and retail markets. Montana ranked well below other states in the region in processing infrastructure. Additional research and policy change will be needed in order to develop a major local product, such as meat, for this market.

- 2. **The Grow Montana Steering Committee was on a steep learning curve in its first program year.** In fact, it's nearly impossible to list all the learning in this report. What follows are the key learnings articulated by the ET, adding to the recommendations for change discussed in the sections above. (Program recommendations are often action steps that emerged from the Coalition's learning. Please note that these are in no order of importance.)

**The Grow Montana Steering Committee has learned that:**

- a. **Couching community-based food systems in economic development terms plays well in a number of different arenas** and most importantly to all the constituencies currently engaged with Grow Montana. Furthermore, it has appeal to both Republican and Democratic Legislators.
- b. **State government agencies are not our enemy and in fact they are becoming our allies, friends and supporters.** The change to a Democratic administration has made an incredible difference in Montana. Grow Montana Steering Committee members were conditioned by mindsets and ways of operating/surviving the past 20 years of conservative Republican rule and some mental re-adjustment and new ways of operating were required on their part.
- c. **A good deal more about how the formal and informal Legislative process works.** *“The 2005 Legislative Session taught us a great deal about how to work in the Legislature and particularly how to work with the Legislative Council in formulating bills.”* (Comment of the Program Coordinator) Grow Montana better understands the value of policy incentives and opportunities that help to drive the market, rather than requirements and restrictions. This is especially relevant to the procurement legislation.

Grow Montana has done an excellent job of documenting its strategies, rationale, mistakes and course correction in moving its bills through the 2005 Legislature. This documentation may prove useful to other states interested in promoting similar policy and Grow Montana is willing to share this information.

- d. **Local policy efforts, such as passing the Wellness policy in Missoula County (a federally mandated requirement for all school districts), takes as much time and energy as some statewide initiatives. Grow Montana does not have the resources to offer much assistance to those interested in working on local**

**policy** initiatives. Grow Montana can offer tested models and a small amount of phone consultation, but that's about all at this time.

- e. **The real work of this two-year program is to create a new and diverse coalition of sound working relationship and a collective vision for alternative food systems in Montana. Working together on policy change is the mechanism for building the long-term movement.** Creating a community-based food system in Montana is long-haul work and the few pieces of policy this project develops will have a minimum impact on the greater vision. Therefore it's critical to pay close attention to the process of working together so that all involved have positive experience that will encourage future cooperative efforts.
- f. **If Grow Montana is serious about supplying local food to public institutions and food services, mid-sized farms and ranches, many of which currently grow commodities, will have to change what they grow to furnish the needed products and smaller enterprises will have to expand** (with the exception of meat). This presumes some big changes in agriculture in Montana and will require significant resources dedicated to education and technical assistance.
- g. **More work needs to be done in Montana to unravel the complexity of issues wrapped up in food security.** The Grow Montana Steering Committee needs to have conversations with its food security allies that create a workable boundary between access to nutritious food and solving all the major issues of poverty in this state. Together these group need to determine how can Montana's poor be effectively engaged and benefit from a community-based food system.
- h. **Its different program components reinforce and build upon each other to create desired results.** For example, interviews conducted by the consultants that undertook the Institutional Market Assessment increased awareness of the demand for local food and paved the way for FoodCorps. The Program Coordinator described her experience, *"When I met with the Food Service Director at MSU, he said, Oh yes people are really starting to show interest in this (local food). I had a guy come interview me about it just the other day."* A representative of Team Nutrition, a project of the Office of Public Instruction, attended the Governor's Food, Farms and People Planning Conference, and is now writing a grant to promote Farm to School. The Lake County CDC staff assistance to Salish Kootenai College, plans to write a USDA RCDC grant supporting a business incubation center without walls on the Reservation, this created the relationships leading to Salish Kootenai College participation as a FoodCorps site.

## **V. Additional Thoughts by the External Evaluator**

Obviously, Grow Montana has accomplished a great deal with its limited financial resources – the Kellogg Foundation investment is multiplying. When organizations with diverse interests work effectively together, an extremely powerful synergy is created. Taking this to the next level, I believe that a great deal can be learned from conversations among the Kellogg state-level policy project grantees. Unfortunately, this opportunity is being missed. All of the Kellogg state policy grantees are struggling with many of the same barriers (each having a particular local slant). I would also venture that the policy handles and options being developed by grantees can be used in multiple locations. Let's not re-invent the wheel.

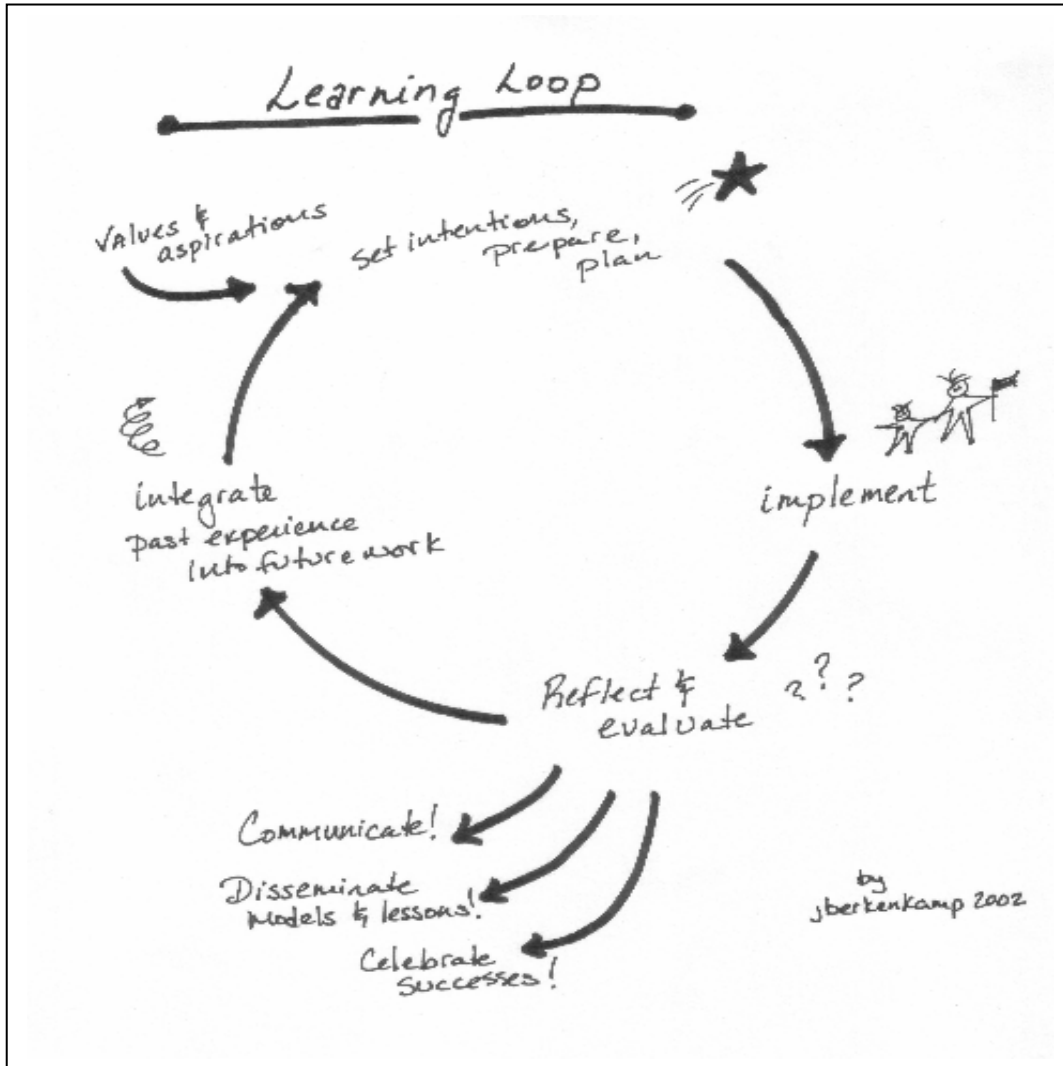
I would recommend that state policy project grantees hold regular phone calls or meet for a day or two to share research methodologies, results and policy options. (I also am

somewhat hesitant to make this recommendation knowing how stretched Grow Montana is at this juncture.) At the very least, they could exchange program and evaluation reports and follow the exchange with a conference call or two.

Furthermore, these organizations should be talking about potential policy actions at the state level that could influence the Farm Bill. A good example is passing state-level resolutions that are in support of federal legislation that allows for interstate commerce of state inspected meat, where such inspection is equivalent to federal inspection.

Let's multiply the impact of the grantees' individual work and make the best use of the Kellogg Foundation investment.

# Appendix A



# Appendix B

## **Grow Montana Evaluation Plan Narrative**

### **I. January 1, 2005 –April 30, 2007**

#### **I. Introduction and Scope**

Grow Montana is a collaborative project of the National Center for Appropriate Technology (NCAT); Environmental Studies Program (EVST), University of Montana, Missoula; Alternative Energy Resources Organization (AERO); Lake County Community Development Corporation (Lake County CDC), and Artemis Common Ground (Artemis), and Stranie Ventures LLC. Its purpose is to enable Montana's food producers to meet more of the state's food needs. Grow Montana promotes economic development policies that support sustainable Montana-owned food production, processing, and distribution, and improve all residents' access to Montana foods.

Grow Montana views evaluation as a method or process for continuous learning and program improvement. Employing the Learning Loop Model, developed by JoAnne Berkenkamp, Grow Montana's is a systematic approach to assess and communicate the program's outcomes, effectiveness and learning. (See Attachment I: Learning Loop Model.) The Grow Montana program evaluation is both summative and formative and highly participatory. An Evaluation Team (ET), (see page 3) composed of representatives of six of the partner organizations and the external evaluation consultant will lead and oversee the evaluation. In September 2005 the ET met for a full day to draft this plan. The Grow Montana Steering Committee has reviewed, discussed and approved the evaluation process that is described in this document.

The Grow Montana evaluation will span the time period of **January 1, 2005 through April 30, 2007**, although the W. K. Kellogg Foundation grant officially began in May of 2005. Our timeframe covers two Montana Legislative sessions (the Montana Legislature meets for 90 days at the beginning of odd-numbered years) to provide a longer period in which to effect food policy change and a more comprehensive picture to learn from experiences. Grow Montana defines policy very broadly and includes both private/corporate and public (local, state and national) administrative and legislative policy. Although the Grow Montana program includes legislative strategies and activities and this evaluation will assess their effectiveness, no W. K. Kellogg Foundation funds will be used for lobbying communications or activities.

The Grow Montana program has adopted the following outcome goal and objectives as the basis for this evaluation.

**Outcome Goal:** Montana's policy and economic climate, resources and infrastructure support an emergent, community-based food system and sustainable agricultural economy.

**Objective #1:** Identify the policy changes and infrastructure needed for development of community-based, local and regional food and agricultural enterprises.

**Objective #2:** Build a diverse coalition and a broad base of political support for common-sense solutions to the problems faced by Montanans working to build a secure, Montana-based food economy.

**Objective #3:** Work to make the changes necessary to foster a more Montana-based food economy.

This evaluation plan is divided into the following sections:

- VII. Introduction and Background
- VIII. Purpose and Role of the Evaluation Team
- IX. Context and Baseline
- X. Values and Beginning Assumptions
- XI. Evaluation Questions and Indicators of Success
- XII. Key Data Collection and Analysis Tools
- XIII. Appendices
  - A. The Learning Loop Model (Appendix I)
  - B. Primary Data Sources for Evaluation Questions (Appendix II)
  - C. Tool Development Timetable and Responsibility (Appendix III)

**This evaluation is both formative and summative and strives to identify and document:**

- Program accomplishments and progress in meeting intended goals, objectives and indicators of success or benchmarks.
- Program challenges, gaps and barriers.
- Lessons learned about how to make a case for and foster food systems change in Montana.
- Outcomes and impacts (both anticipated and unanticipated) and any “ripple effects”.
- Recommendations for improvement and next developmental steps.

**The primary “audience” or “consumers” of this evaluation are:**

- The Grow Montana Steering Committee and its partner organizations.
- The W. K. Kellogg Foundation.
- Members and allies of the Grown Montana Coalition.
- The Montana Department of Agriculture.
- Economic development agencies in Montana.
- Other funders of Grow Montana.
- Other organizations promoting food systems change and sustainable agriculture.

**The primary evaluation participants include:**

- The Grow Montana Steering Committee and its partner organizations.
- Participants at the 15 statewide workshops where research data will be discussed and opportunities developed.
- Members and allies of the Grown Montana Coalition.

## **II. Purpose and Role of the Evaluation Team**

The purpose of an Evaluation Team (ET) is to provide leadership for and ownership of the Grow Montana program evaluation process, findings, lessons learned and recommendations. The ET will help keep the evaluation grounded in the needs, aspirations and realities of the organizations that make up the Grow Montana program coalition. A team approach also provides a number of perspectives and lenses from which to analyze and make meaning of the collected data. Because the ET includes key leadership of the Grow Montana program, the likelihood that program improvements and recommendations—identified through the evaluation process—will be owned and implemented is high. The external evaluator, also a team member, will help to facilitate the evaluation process and provide a more distanced perspective.

Evaluation team members include: (1) Nancy Matheson, Grow Montana, project director and NCAT employee; (2) Jan Tusick, program director, Lake County CDC; (3) Jonda Crosby, executive director, AERO; (4) Crissie McMullan, project coordinator under contract to NCAT; (5) Beth Neely and Scott Kennedy, University of Montana graduate student researchers, and (6) Pam Mavrolas, external evaluator.

## **II.**

### **III. Key Responsibilities of the Team**

1. Help to draft the two-year evaluation plan for the Grow Montana program.
2. Implement evaluation tools and conduct interviews as appropriate.
3. Oversee and assist in data collection and compilation where appropriate and feasible.
4. Keep the Grow Montana Steering Committee abreast of the evaluation progress and findings.
5. Participate in two day-long analysis meetings in May of 2006 (formative) and May of 2007 (summative) to analyze the data, identify progress, articulate challenges and lessons learned, and make recommendations for program improvement and continuation.
6. Review and comment on evaluation reports as needed and appropriate.
7. Ensure that the evaluation is meeting the needs of the program and proceeding on schedule.

## **III. Context and Baseline: Conditions Prior to January 2005**

### **Background and History**

In economic terms, agriculture remains Montana's number one industry and is still dominated by family-owned and operated farms and ranches, currently about 28,000 of them. In 2000, agriculture generated 36 percent of the state's income. Montana farmers and ranchers produce mostly low value, undifferentiated raw commodities for export, principally wheat, barley, and feeder calves.

Because of its economic and political origins as a colony rich in natural resources exploited by powerful out-of-state interests like the Anaconda Copper Company, Montana to this day tends to look to outsiders for economic salvation. As a result, Montana lacks access to venture and investment capital and suffers from a shortage of local entrepreneurs.

Like many export-commodity-producing states, Montana lost most of its food processing capacity and infrastructure by the 1950s. Montana also lost the transportation infrastructure needed for local and regional distribution of Montana-produced goods. Montana's vast size and sparse population make creation of community-based enterprises and in-state distribution a huge challenge. Economies of scale in terms of processing and distribution are simply very difficult to achieve. An added hindrance to rebuilding Montana's food processing infrastructure is the fact that food sanitation laws and regulations are increasingly burdensome and inflexible for small scale operations because they are designed for industrial-scale enterprises that are rife with contamination vulnerabilities.

Montana is a net importer of food, spending \$3 billion annually while producing just under \$2 billion in agricultural products. This fact represents an opportunity for increasing the volume and value of Montana-grown food produced for in-state markets.

### **Economic and Political Conditions**

There are many conditions in Montana conducive to development of community-based food economies that can support the Grow Montana project. These include a new political climate led by Governor Brian Schweitzer, a farmer and soil scientist with a "can-do" attitude and aggressive focus on economic development. The same election that brought Schweitzer to power also shifted the political balance in the state legislature, with one house evenly divided between Republicans and Democrats, and the other with a Democratic majority. The president of the Montana State Senate is an organic grain grower. While partisanship is still a negative factor, it is not as strong as it has been, with both parties focused on economic development. With agriculture suffering eight years of drought, policymakers and community and agricultural leaders are open to new ideas outside the conventional commodity realm.

In addition, Montana is a leading state in organic production, which is starting to open the eyes of state agricultural leaders to different kinds of opportunities beyond simply increasing production of conventional commodities and increasing commodity payments. There is increasing interest in practices that are rewarded with federal conservation payments and a recognition that federal farm policy must shift toward such payments. There is also a backlash among agricultural leaders in the state against additional free trade agreements, and complete support for country of origin labeling.

The leadership of many of the major farm and commodity organizations in the state is getting younger, and alternatives to the NCBA-aligned Montana Stockgrowers Association have formed and are gaining influence: the Montana Cattlemen's Association and R-CALF.

While Montana's climate provides a relatively harsh and short growing season that limits seasonal variety, we are fortunate to have had a study done in the 1980s by Marcia Herrin and Joan Dye Gussow showing that Montana can, and once did, grow a nutritionally complete, year-round diet. That study provides details on the specific food crops that can be grown in commercial quantities.

In recent years, Montana's active food, hunger and nutrition interests have shifted their work from an emergency food system approach to one of food security, an approach that makes them potentially strong allies of Grow Montana. The added concerns about obesity and diabetes, particularly among children and American Indians have focused local and state policy leaders on school nutrition and nutrition on Montana's seven Indian reservations. Several schools in Montana have removed pop machines and moved noon recess before lunch.

### **Previous Groundwork Laid by Project Partners**

#### AERO (Alternative Energy Resources Organization)

AERO's multi-year "Buy Fresh Buy Local" campaign and community-based projects have generated political and grassroots support for policy changes needed to support the development of community-based food systems and infrastructure. These efforts have also generated a list of policy needs and opportunities to inform the Grow Montana project's thinking. Also, AERO's biennial directory to local, sustainably grown food, Abundant MT, has served to network many of Montana's local food enterprises, including producers, processors, restaurateurs and grocers, which can serve as a valuable asset to Grow Montana. A couple of years ago AERO convened a "Building Bridges" meeting of sustainable farmers and ranchers and conservation leaders that resulted in a common ground agenda and political allies. Prior to these activities, AERO's farm improvement clubs, community-based food system projects and years of grassroots organizing forged many of the relationships and laid much of the groundwork needed to carry out the work of Grow Montana. Montana's first co-op development and food processing center grew out of one of AERO's earliest farm improvement and community food system clubs, and the food systems work forged important relationships with Montana's nutrition, hunger and low-income activists. AERO also hosts the local food system educational traveling road show, the Local Yokels, founded and performed by EVST graduate students.

#### Artemis

Artemis has hosted several public radio programs and community discussions (which were also broadcast via Montana public radio) on issues and opportunities in sustainable agriculture and local food systems. Artemis has brought the perspectives of people like Fred Kirschenmann, Tom Elliott and Bob Quinn to Montana listening audiences. Artemis' president, Brian Kahn, also has a long history of building relationships across the conventional agriculture, sustainable agriculture and conservation communities. As state director of the Montana chapter of The Nature Conservancy he founded TNC's Conservation Beef production and marketing program. Artemis' weekly radio interview programs have enabled Brian to develop ongoing relationships with federal, state and local policymakers throughout Montana.

#### LCCDC (Lake County Community Development Corporation)

Thanks in large part to the efforts of LCCDC, Montana has one of the nation's 10 Agriculture Innovation Centers that is channeling economic development resources to community-based food and ag enterprises. It has also served as a hub connecting the state's community development corporations (CDCs) to each other around food and ag projects. LCCDC also houses one of Montana's two very active cooperative development centers, and has created alliances with the other. The LCCDC's coop development center also has a business incubator, commercial kitchen and food processing center available for use by Montana entrepreneurs. As an active member of the Montana Economic Development Association, LCCDC has important relationships and influence throughout the state's economic development arena. LCCDC has

relationships with state agency leaders that are key to Grow Montana's state policy success, including the Departments of Livestock and Agriculture.

### NCAT

As a Montana-based national information provider in the areas of sustainable agricultural production, processing, marketing, food systems and policy, NCAT has expertise useful to the Grow Montana project and relationships with grassroots producers, technical assistance providers, researchers, policymakers and innovative projects throughout the country to help inform and support the Grow Montana mission and vision. The Southwest Marketing project has served as an important source of learning and models pertinent to Grow Montana. Thanks to the financial support of Stranie Ventures, NCAT was able to contract with a policy researcher and organizer and a lobbyist on behalf of Grow Montana in advance of the 2005 Montana Legislature.

### Stranie Ventures LLC

Stranie Ventures owns and operates Common Ground Farm, an organic produce farm that was a core founder of the Western Montana Growers Co-op, the state's largest coop of food producers and processors created specifically to serve local and regional food markets, including institutional food services like UM' Farm to College program. Stranie Ventures also commissioned the feasibility study the growers co-op needed to assess both potential markets and organizational structures, information useful to Grow Montana. Common Ground Farm hosts the Western Montana Growers Co-op offices and staff. Stranie Ventures provided the Grow Montana project partnership with its first grant, enabling us to begin our policy work with the start of the 2005 Montana Legislature. Stranie Venture's Mary Stranahan has a long history of working with and supporting AERO.

### UM-EVST

A few years ago the University of Montana-Missoula added to its renowned Environmental Studies Program (EVST) a Food and Agriculture emphasis, and hired Dr. Neva Hassanein as its lead faculty member. This program emphasis provided a way to integrate the student farm and its Program in Ecological Agriculture and Society (PEAS) into its new food and agriculture curriculum. This partnership includes social, economic and ecological research capacity, farm apprentices and internships, new farmers, a CSA, and improved food security for low income Missoulians. Research projects have included a county-wide community food assessment that involved 22 EVST students and resulted in formation of a Missoula County food policy council called the Community Food and Agriculture Council (CFAC). Other student projects included research into and development of Montana's first farm to college program at the U of M. Two EVST graduate students went on, respectively, to run UM's Farm to College program and to help the Western Montana Growers Co-op in marketing to the University Dining Services. The former, Crissie McMullan, became the Grow Montana project coordinator and policy researcher, thanks to the financial support of Stranie Ventures. Crissie is also a founder of the Local Yokels, and still performs with this educational and entertaining troupe. The EVST program is producing a new generation of agriculture advocates and leaders. Dr. Hassanein comes from an activist background, working as a community organizer with Montana's Northern Plains Resource Council— a Grow Montana ally, as a board member of AERO, and in Oregon.

### UM Dining Services

As described above, the UM Dining Services started what has become a successful Farm to College program with research and implementation support from EVST students. This program

has generated lessons about how to start a farm to college program in a commodity state with little processing or distribution infrastructure and not many commercial diversified farms. It also has identified many of the practical and policy barriers small food suppliers face, as well as policy barriers the Dining Services face in attempting to buy from in-state suppliers. Both the success and barriers can inform the work and priorities of Grow Montana. The Dining Services director, Mark LoParco, and his staff promise to be a strong political ally in proposing ways to make it easier for similar programs to develop in colleges and other public institutions.

#### Others

Other allied organizations in Montana have been working in a variety of ways to advance the idea of and put programs and tools needed for development of community-based food systems. Most notable for their efforts and their relationships with Grow Montana partners are: the Montana Farmers Union, the Montana Organic Association, Northern Plains Resource Council, the Chefs Collaborative, Corporation for the Northern Rockies, and the Montana Food Policy Coalition.

### **IV. Values and Assumptions that Underpin Grow Montana’ Efforts**

Grow Montana believes that community-based food systems change is likely in Montana if it successfully executes these steps:

1. Arms itself with the research and information to make a credible case for bringing regional food and agriculture to the center of Montana’s economic development policy, particularly the economic, social and environmental contributions of existing components of Montana’s emerging regional food system, and what it will take to create “more of it.”
2. Builds a broad base of political support from a diversity of interests and sectors, both rural and urban who are concerned about food, agriculture, energy and Montana’s sound economic future.
3. Identifies, through on-the-ground action, policy barriers to and opportunities for development of the infrastructure needed to support local and regional food systems.
4. Works to secure policy changes identified through our on-the-ground activities and the experience of our broad coalition by drawing on the power of coalitions to influence policymakers and mobilize citizens.

Underlying these four strategic steps are a number of assumptions and beliefs held by Grow Montana leadership. What follows is not an exhaustive list, but includes those beliefs most apparent at this juncture and are agreed upon by the Steering Committee members.

1. Montana agriculture and rural communities are desperate for effective and sustainable economic development strategies.
2. Public policy (local to international) greatly influences the agricultural business and economic climate in our state.

3. A community-based local food system, where food is grown, processed, distributed and consumed in Montana, is a promising, yet long-term vision, for rural economic development.
4. Public institutions are significant food consumers in Montana and a good potential market to begin Grow Montana's efforts.
5. Issues of food safety, access and environmental impact are all necessary elements to consider of sound agriculture and food policy.
6. Research and analysis of the social, political, economic and environmental outputs and impacts is a critical first step in developing sound food systems change.
7. Research and analysis must be ground-truthed by people working at the grassroots level in order to create a truly community-based food system for Montana.
8. People engage in policy change efforts when they encounter barriers to their enterprise or goal and are able to articulate policies (both public and private) that could help alleviate the problem.
9. Change occurs most readily in places where momentum or lift are beginning to occur (rather than places where forces need to be stopped and re-directed.) Grow Montana plans to take full advantage of these openings or places of lift.
10. Food systems change provides the common ground where otherwise divergent organizations and constituencies can meet and create a shared vision.
11. The key to policy success in Montana is to create and activate a diverse coalition where political muscle can be applied from a number of different directions. The Grow Montana coalition will include, but not limited to: (1) conventional and sustainable farm organizations; (2) health, human service and nutrition constituencies; (3) eaters who share our values; (4) economic development agencies; (5) environmental and conservation organizations; (6) policymakers at all levels and (7) private businesses and entrepreneurs.

## **V. Evaluation Questions and Indicators of Success**

The Evaluation Team identified the following as important to learn more about and understand through this two-year, Kellogg Foundation funded program. These questions are not representative of all of the program objectives, but ones the ET identified as most important.

- 1. What policy changes, and/or progress toward desired policy change, resulted from the efforts of Grow Montana (directly and indirectly)?**
  - b. What policy changes were attempted, which secured and which not successful? Why?
  - e. What policy changes were consider, but not selected? How did the Steering Committee apply its criteria? Who were policies not selected referred to? Why?
  - f. What new opportunities did the policy changes create and for whom?
  - g. What new barriers did the policy changes create and for whom?
- 2. What accomplishments and outcomes other than policy, expected and unexpected, resulted from the efforts of Grow Montana?**
- 3. How effective were the research and outreach/communications strategies employed by Grow Montana in generating new understanding, interest and support for a**

**community-based food systems policy and action priorities from a diverse group of stakeholders?**

- 4. What were the key lessons learned by Grow Montana in effecting food systems change in Montana?**
  - a. How has this effort influenced the Steering Committee’s starting assumptions about the promise of Montana-based food systems change?
  - b. What has Grow Montana realized about its theory of change?
  - c. What are the next, logical steps in creating community-based food systems and a vital agricultural economy for Montana?
  - c. What are the recommendations for Grow Montana’s growth and development now and beyond April 2007?
  
- 5. How effective has Grow Montana been as a coalition in advocating its policy agenda?**
  - f. Who joined the coalition? How diverse a mix of organizations is it? Is it the “right” mix? Any key constituencies missing?
  - g. How well have coalition members, at all levels, worked together to achieve the coalition’s outcomes? How satisfied are members with their coalition experience? What worked well? What proved divisive?
  - h. How effective were communications between and among Steering Committee, coalition members and allies?
  - i. What has the Steering Committee learned about how to organize and maintain a vital policy coalition over two years?
  - j. What areas need improvement?
  
- 6. What new longer-term capacity (new leadership, organizational structures, working relationships, financial resources, political cachet, knowledge, new tools and models, public support, etc.) has been developed by this Grow Montana effort? What foundation has been laid?**

**Tangible Benchmarks or Indicators of Success**

Another way to track program progress is to set indicators of success. Indicators of success are shorter term (one year), tangible and often quantifiable benchmarks. These indicators augment the longer-term, more qualitative, evaluation questions. These indicators of success are yet another vehicle for monitoring whether the program is on track to meet its objectives. What follows is the core list of this project’s major indicators of success.

<b>Year One Key Indicators of Success January 1, 2005 – April 30, 2006</b>	<b>Year Two Key Indicators of Success May 1, 2006 – April 30, 2007</b>
A market potential and feasibility study that explores increasing the volume of Montana-grown and processed food purchased by Montana’s public institutions is completed.	
Case study research of the economic, social and environmental contributions of the community-based food system that serves	Case study assessment and institutional market feasibility study results and analysis are published and disseminated to key

U of Montana's Farm to College program is completed.	leaders and the interested public.
6 workshops held around MT to: (1) disseminate and ground-truth the public institutional market feasibility study and local food systems case study and (2) identify constraints, needs and opportunities for local food and agricultural policy and infrastructure needs. The workshops will engage at least 120 key leaders.	9 workshops held around MT to: (1) disseminate and ground-truth the institutional market feasibility study and local food systems case study results and (2) identify constraints, needs, opportunities and potential leaders in developing community-based food and agricultural enterprises. The workshops will engage at least 150 key leaders around the state.
	Two institutional market development projects are selected by local communities, entrepreneurs, agencies, etc., and development work begins.
Legal analysis of how to improve the climate for cooperative businesses in Montana is completed	Legal analysis used in policy and cooperative business development work.
A more comprehensive picture of the opportunities and constraints of a statewide, community-based food system, grounded in community relationships, begins to emerge that can inform Grow Montana's policy choices.	This comprehensive picture continues to evolve and develop as groups and leaders gain knowledge and experience.
3 key initiatives supporting community-based agricultural enterprises: (1) AERO's Montana Buy Fresh Buy Local Network (20 enterprises), (2) Missoula's Farm to School Program and (3) Lake County CDC services offered to western Montana entrepreneurs (10).	2 more community-based initiatives added and growth in number of enterprises served by BFBL Network (total 30) and Lake County CDC (total 15).
Introduce and promote two bills in the Montana Legislature: allow for state inspection of mobile meat slaughter facilities and provide a bidding preference for Montana-produced food in state procurement.  MT Department of Agriculture implements mobile meat slaughter law through balanced rulemaking.	
A Grow Montana Coalition of 15 member organizations is created.	Grow Montana Coalition adds 10 new member organizations and 8 allied organizations.
3 to 5 policy priorities are chosen by Coalition through the research and public discussion processes, and supportive decision-makers briefed.	Grow Montana takes the lead on 2 to 3 bills in the 2007 MT Legislature and supports up to 3 additional bills. Grow MT also works on up to 3

	administrative and local policy initiatives.
	At least 5 MT agricultural, economic development, human service organizations have added Grow MT policy initiatives to their legislative agendas.
\$100,000 is raised to match to the Kellogg Foundation grant.	\$200,000 total is raised to match the Kellogg Foundation grant.
Grow MT Communications Plan that deals with both internal and external communications is created and meets Year 1 objectives.	Communications Plan continues to be refined and implemented, especially in message development for legislative work.
Program evaluation plan is created and implemented under the leadership of an active Evaluation Team and External Evaluator. Formative report written.	Grow Montana is using evaluation as a tool for continuous program learning and improvement. Summative evaluation report written.

## VI. Key Data Collection and Analysis Tools

The tools listed below will be used to collect and initially analyze information needed to explore answers to the evaluation questions and to determine whether the indicators of success are being met in a timely manner. A number of these data-gathering strategies are currently in place and being used by core partners, although some modification may be in order. Please see Appendix II to determine which tools will be used to gather data for each evaluation question. Appendix III gives a timeline for developing and implementing each tool and who is responsible for its development.

D. Tool Description	Tool Purpose
<b>Overall Program Evaluation Tools</b>	
<b>Core Partner Semi-Annual Reports</b> (Modify report questions to be more consistent with our evaluation questions.)	Narrative report documenting significant activities, discoveries and outcomes every 6 months.
<b>Core Partner Annual Phone Interview</b> After annual reports external evaluator conducts follow-up phone interview to focus on outcome/impact, what difference actions made, lessons learned and new capacity created.	Take each partner's narrative report information to a deeper level and get beyond activities and into what's changed or different. Get to the meaning of the action and how it's getting Grow Montana closer to its objectives as well as reflect on partner insights and learning.
<b>Steering Committee Meeting Notes</b> taken by Crissie. Of special importance is the core partner "Reports and Updates" section.	Crosscheck on the reports and identify synergy of partner actions and learning.
<b>Steering Committee Meeting Assessment Discussions.</b> At each Steering Committee regularly do a brief assessment of how the work is progressing. Make recommendations for change or course correction as needed. The external evaluator can design some standard questions and/or tailor reflective questions to a particular topic. ET members would facilitate these discussions and take notes.	On-going summative evaluation, troubleshooting and continuous program improvement.

<p><b>Outreach Tracking Log</b> Record contacts and results of contacts with all potential food and agriculture policy supporter, leaders and influencers. Include: calls, meetings, in person informal and formal discussions, requests for information, legislative contacts, etc. Each partner will post this information on the GM website (secured area) in a standardized format.</p>	<p>Identify the extent of outreach and to keep track of people and organization’s interest and participation over the two years. Also, another source for identifying policy needs, opportunities and barriers.</p>
<p><b>Matching Resources Matrix</b> Documents both dollars and in-kind services that match the Kellogg grant. All core partners keep track of the resources they contribute or receive and their value and Nancy will keep track of resources directly to Grow Montana, including membership dues.</p>	<p>Document how Kellogg Foundation grant leveraged other resources. (NCAT’s Financial Department will continue tracking this information.)</p>
<p><b>Grow Montana Coalition Interviews</b> Phone/personal interviews with key leaders, members and allies in the Grow Montana Coalition to assess their participation and experience, Coalition communication and operations and suggestions for improvement. (year-two activity only)</p>	<p>Assess effectiveness of Coalition and identify capacity built through Grow Montana.</p>
<p><b>Workshop/Presentation Tools</b></p>	
<p><b>Workshop/Presentation Feedback</b> (has several pieces)</p> <ul style="list-style-type: none"> <li>▪ Standardized sign-in sheet.</li> <li>▪ Written evaluation forms for all 15 workshops/presentations. (Pam will create a template that can be modified as appropriate.)</li> <li>▪ Transcribed flipchart/notes from each meeting that capture policy needs, barriers and opportunities identified at the workshop, as well as most existing ideas to participants, if appropriate.</li> <li>▪ Standard questions that structure a de-brief discussion by Grow Montana facilitators at each workshop. (Data from each workshop written evaluations should inform this de-brief. That means written forms must be compiled immediately after each workshop in order to be included in the de-brief.)</li> </ul>	<p>To document the content and value of each workshop to its participants.</p> <p>To continually improve the workshop.</p> <p>To identify potential leaders for community-based food and ag enterprises and policy change.</p>
<p><b>Documenting/Tracking Outreach and Communication</b></p>	
<p><b>Media File</b> (media generated by GM and also media of GM issues and policies generated by</p>	<p>Track media efforts and coverage of each of the core partners and other coalition</p>

<p>other allied and adversarial groups). Core partners and Grow Montana Coordinator keeps a file of: press clippings, media releases, speeches, articles in other organizations' newsletters, radio commentaries, etc. Copies are sent to the project coordinator incrementally so that she can post them on a master file on website in secured area.</p>	<p>members or allies. Also use to identify gaps in coverage.</p> <p>(Note: there will probably be overlap, but this way we can be sure we are getting everything.)</p>
<p><b>Grow Montana Materials</b> A central file of key materials created by the Coalition is kept by the Project Coordinator, including: handouts, grant proposals, fact sheets, draft bills, etc. These will be posted on the Grow Montana website in the partners' secured section.</p>	<p>Track materials produced and assess tenor and variety of messages to different audiences.</p>
<p><b>Grow Montana Coalition Database</b> A database of Coalition members, allies and important contacts and targets that includes: contact information, when joined, why joined, what level, other contributions, what issues are of most interest, size of membership, etc. will be kept by the Program Coordinator and in fact be an extension of the AERO database.</p>	<p>Keep track of diverse membership, their interests and participation.</p>
<p><b>Research/Reports Distribution</b></p>	
<p><b>Research Reports Distribution</b> Matrix to track where reports are being distributed. Includes: Name of report, who received it (org. and individual), contact information, # of copies and feedback. (This is for both workshop and non-workshop distribution.)</p>	<p>Document where and to whom information is being distributed.</p>
<p><b>Policy Identification</b></p>	
<p><b>Journal Entries</b> The journals are more qualitative personal insights, thoughts, new discoveries and reflections. They are especially helpful to keep track of policy needs, opportunities and barriers. Also personal reflections and thoughts about policy criteria, directions and strategy. This is also a place to track "new capacity" being developed through program and lessons learned.</p>	<p>Observe leaders' thinking over time and to keep track of personal ideas and lessons.</p>
<p><b>The Buy Fresh Buy Local Network Evaluation</b> This AERO program has its own evaluation plan and data that dovetails with Grow Montana's. BFBLN staff is conducting interviews with community-based enterprises and holding its post-season meeting where they are gathering information on policy needs, opportunities and barriers.</p>	<p>Ground-truthing of policy ideas and identification of needs, opportunities and barriers.</p> <p>(This isn't the only place where there is connection to local enterprises and communities. Other AERO members, Lake County CDC clients and Missoula-based Food Council and farm to school programs will also contribute information through oral and written partner reports.)</p>

<p><b>Formative and Summative Reflection and Analysis</b>  Day-long meetings of the Evaluation Team in late May/early June of each program year will analyze data from program and suggest program adjustments for the Steering Committee to consider.</p>	<p>Analyze the information collected, create initial findings, identify lessons and make recommendations for program improvement.</p>
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## **VII. Connecting to Cluster Evaluation**

Grow Montana sees the power and practicality of sharing strategies, accomplishments and discoveries with other Kellogg-funded organizations working on agriculture and food systems policy, especially those projects working and regional levels. We are excited to participate in affinity groups at Project Director meetings and in conference calls facilitated by Headwaters, as well as exchange outreach materials, research results and publications, and evaluation report.

Appendix C

**Schools Used to Collect Data for the Grow Montana  
Year 1 Evaluation Report**



## A Guide to Keeping Your Grow Montana Journal

### **What are you learning?**

Tracking your contacts will be done through the Contact Management Matrix (Tool #1) your journal will include more qualitative information, especially what you are thinking and learning. Your journal is the place to keep track of new information and new ideas that grow MT's priorities or strategies, accomplishments and new capacity developed through Grow Montana including: potential policy ideas and options.

Items you want to make certain to highlight in your semi-annual reports (both accomplishments and gaps) and your understandings.

Your recommendations for program growth and development.

When you travel and meet with interested organizations and potential members you may jot contacts in your journal, but if these contacts are important, you will probably want to transfer them to your "Contact Management Matrix" for all to see.

### **How we'd like your journal to work:**

**Identify a place to keep your journal – a file in your computer or a special notebook.** All Steering Committee members should have your journal immediately, if you haven't already.

**On-going: When you see or experience something of value** – hear something, read something, have a new understanding or meet with someone – write it down as soon as possible

**Use it as a reflection tool:** Try to set aside 15 to 20 minutes every week or so to reflect on Grow Montana (see "bigger picture" questions below).

**As part of your semi-annual reporting, we will ask you to review your journal and pull out important information.** Also, review your journal as you prepare for Steering Committee reports at monthly meetings.

### **Questions for What to Capture in Your Journal:**

**Here are a few questions to help you think about what to put in your journal.**

#### **Specific:**

- What did I learn that needs to be shared with the rest of the Steering Committee?
- What new opportunities or barriers (policy or otherwise) did I discover?
- What successes or accomplishments (great and small) did I observe or experience?

#### **Picture:**

- What have I learned that may suggest a shift for the project?
- What am I noticing about the validity of Grow Montana's starting assumptions? (See pages 6 and 7 of the evaluation plan for a list of questions and assumptions.)
- What new longer-term capacity (new leadership, organizational structure, working relationships, physical facilities, knowledge, tool, community support, etc.) is being created?
- What am I noticing about the growth and development of the Grow Montana Coalition?
- What doesn't seem to be working well? What seems to be stuck or unworkable?
- You may want to add a few questions of your own that specifically relate to your organization and its work.



**What aspects of the meeting were most helpful and why?**

**What aspects could be improved and how would you improve them?**

**What do you plan to do with the information and relationships you garnered at this meeting?**

**Other feedback or suggestions?**

Optional): \_\_\_\_\_

**Thank You!**

# Grow Montana Partners **Semi-Annual Report Form**

**Instructions:**

When writing your responses to the following questions, please review and gather your thoughts from:

• Indicators of Success for appropriate year: (page 8 –10 evaluation plan)

• Your journal entries.

• Your organization’s contract with NCAT.

• Your contact management matrix.

• Notes from the Steering Committee Meetings during this time period. (Especially for items you reported on.)

• Your own files, logs and timesheets.

**Please answer ALL the following questions on this form.** Then email it to Nancy Matheson ([nmatheson@imine.net](mailto:nmatheson@imine.net)) and cc it to Pam Mavrolas ([madmav@onewest.net](mailto:madmav@onewest.net)) Thank you.

**What do you see as your organization’s significant accomplishments, progress and/or outcomes that have contributed to the overall success of the Grow Montana Coalition over the past 6 months?** *(Please focus on your organization’s responsibilities and contributions, but also feel free to add collective accomplishments and outcomes.)*

**Anticipated/Planned:**

**Anticipated/Surprises:**

**What public presentations/community workshops have you done over this 6-month period?**

IV. <u>Who to?</u>	Date:	How many participants?

*Note: This is the index: other tools ask for additional information.)*

**What problems, setbacks and/or unmet commitments did your organization or the Grow Montana Coalition encounter over the past six months?**

**What new capacity (new important contacts, new leadership, organizational structures, working relationships, knowledge, tools, models, etc.) do you see Grow Montana developing/acquiring over the past year?**

**What resources, both cash and significant in-kind, has your organization committed and/or raised in the past six months for its Grow Montana efforts.** (We use this as the Kellogg Foundation match.)

**What are your ideas and suggestions for improving upon how Grow Montana is approaching and conducting its work both in the outside world and within its Steering Committee?**

**Please provide an accounting of your Kellogg grant expenditures from Oct. 1, 2005 – April 30<sup>th</sup>. (This financial information is due no later than May 31.)**

**Please send any media clippings, outreach materials, etc. that would be valuable to append to the Kellogg report. Send a copy to Crissie, but list what you will be sending in this report.**

**you**

# Research Reports Distribution Matrix

## Purpose and Instructions

The purpose of this tool is to keep track of who is getting the Coalition research information. **Use this when you mail or hand out a study, or executive summary of a study larger than 2 pages, to an individual, organization or agency.** (The workshop sign-in sheet will include columns to check what information each person took, so you will not need to track that here.)

You may handwrite this information in this matrix or keep the information electronically.

At the end of each program year you will be asked to supply a copy of this matrix.

	<b>Sent to:</b> (name/organization/agency)	<b>City in MT</b> <b>or Other</b> <b>State</b>	<b>Public</b> <b>Institution</b> <b>s Market</b> <b>Study</b> (# sent or given)	<b>Local Food</b> <b>System</b> <b>Case</b> <b>Studies</b> (# sent or given)	<b>Other studies/research</b> (name and #)	<b>Notes or</b> <b>Comm</b>

# Please Give Us Your Opinion!

Grow Montana Coalition commissioned Unlocking the Food Buying Potential of Montana's Institutions study and report. We want to know your thoughts and reactions. **Please take five minutes and fill out this questionnaire and mail it to:** Crissie McMullan, Grow Montana Coalition Project Coordinator, 1131 Jackson Street, Missoula, Montana 59802.

**Circle your response to the following statements:**

	<b>Poor</b>				<b>Outstanding</b>
<b>Overall quality of the Institutional Market Study.</b>	1	2	3	4	5

Comments:

<b>Study gave me new information and understanding of Montana's public institutional markets.</b>	1	2	3	4	5
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Comments:

<b>Study report will be useful in my work.</b>	1	2	3	4	5
--	---	---	---	---	---

**Please tell us how you or your organization has or will be using this report.**

**What new opportunities did this report help you see for your community, program or business?**

**What research questions or ideas do you have for future study in this area?**

**Would you like to be put on the Grow Montana Coalition mailing listing and be kept abreast of its activities and policy initiatives?**

Name:

Address:

City:

State:

**How would you describe yourself:** (Select the most appropriate descriptor.) **I am in the field of:**

Food Production

Food Processing/Distribution

Food Service

Low-income and Anti-hunger Advocacy

Health and Nutrition

Public Policy/Government

Conservation/Environment

Education/extension

Other, please specify: \_\_\_\_\_



# Debriefing Form for Person/s Facilitating Community Workshops/Meeting

**Instructions:**

If you facilitated a community workshop answer the following questions in writing and send it along with attachments to: **Paras (2015 Williams Street, Helena, MT 59602) as soon as possible.** If more than one person facilitated, please help and summarize your responses. Attachments include:  
- Flipcharts, either original or transcribed.  
- Workshop participant list.

**Workshop Location and/or Audience:** \_\_\_\_\_

**Which Study/s:** \_\_\_\_\_

**Estimated Number of Participants:** \_\_\_\_\_

**Facilitator Team:** \_\_\_\_\_

**I recommend that a short +/-change oral evaluation be conducted at the end of each workshop.** What did you like about this workshop? What would you change to improve it? (Please send or transcribe the flipchart and attach it to this form)

**How actively were participants engaging in the workshop?**

	2	3	4	5
		Somewhat		Very Active

Comments:

**How well was the presentation of the study/s received by the participants?**

	2	3	4	5
		Somewhat		Very Well

**What were some indicators or behaviors that influenced your rating?**

**What seemed to work well?** (Please consider the logistics, format and content of the meeting when answering this question)

**What key concepts, questions and/or data generated the most interest?** (If recorded on a flipchart, or send a transcription please attached transcribed version.)

**What were the most interesting policy options and ideas that emerged from this group?** (Please send or transcribe flipchart and attach it to this form.)

**Were there anything you would do to improve the workshop or the workshop's outcomes?**

**Other observations, thoughts and outcomes?**

**Reflections Assignment (updated from original syllabus)**

tenet of effective organizing, community-based action research, and participatory education is a commitment to an on-going process of reflection. Through deliberate, thoughtful, and honest reflection, we can learn from our actions and then use that knowledge in our work. We not only learn about particular issues and how we might tackle them more effectively next time, but we also develop a network and/or organizations. This is not only good process, but foundations also typically require such reflection through an evaluation process so they can make decisions for future funding and know the results of their “investments” in particular projects.

This time to engage in a reflection and evaluation process, as described below. Toward that end, we will all write a 3 to 5-page (double-spaced) reflection paper, which will be due on Sunday May 7, when we gather for dinner at my house. Please be prepared to share your reflections orally with the group, as well.

In your paper, I would like you to thoughtfully and honestly discuss each of the following:

The community-based action research we have done and the process used: What do you think are the advantages and disadvantages of doing community-based action research in a university setting? To what extent do you think we accomplished our goal of doing “research that can be used for action”? What else about the research strikes you as important to think about?

The quality of your own work: Where did you stretch or challenge yourself the most? What might you have improved upon in terms of the quality of your own work and your contributions to the team/class effort? What were your personal successes this semester?

The “take home lessons” you want carry forward: What lessons did you learn about action research and about the food system? What leadership and/or research skills do you think you developed through our work? What did you learn about yourself? What do you want to take away from this experience to help you in the future?

Finally, I will also engage in the above process with you and share my own paper with any of you who would like to read it.

In the syllabus I indicated that class participants would evaluate other members of their research teams. As it turned out, many of our “tasks” were quite fluid with tasks and team assignments shifting as things progressed. Thus, the original plan I had does not seem to fit. I feel grateful for the use of everyone’s contributions, and think we can let go of this piece.

Final request: Would you be willing to let me share your reflection paper as part of Grow Montana’s evaluation process? It is up to you to be heard to hear from each of you individually about your preference. Indicate that at the end of your paper. Our work has been an integral part of the Grow Montana project, which is funded by the Kellogg Foundation and major donors. Your reflections will contribute greatly to the Grow Montana’s evaluation process, which is facilitated by Pam Mavrolas.

## Process for the Grow Montana Coalition Steering Committee to Evaluate Major Activities/Events

### **Use and Instructions**

Following assessment process is a facilitated series of questions to guide an evaluative conversation of the Grow Montana Steering Committee when assessing the value and effectiveness of major events and activities. A facilitator of this conversation should be appointed and notes should be taken either on a flipchart or on paper. A copy of discussion notes should be provided to the external evaluator. Times to explore each question are suggested. Try to complete this conversation in 30 to 45 minutes.

**Begin by asking each person to identify the 1 or 2 things that really stood out for them personally in regard to this event/activity.** (What stood out? What was significant?) *(5 min.)*

**How well did this activity meet our intentions and stated objectives?** Use your personal observations as well as evaluation form data to respond to these questions. *(15 min.)*

**Where were we strong?**

**Where were we weak?**

**How can we improve? What might we do differently next time?**

**What specific outcomes or progress did Grow Montana realize by this event/activity?** *(5 min.)*

**Are there specific questions germane to this particular event/activity we want to explore?** List them out first and then identify the one or two most important to discuss. *(10 min.)*

**Any appreciations or recognition in order? Whom and for what?** *(5 min.)*

**Summarize next steps:** *(5 min.)*

**Year End Grow Montana Partner Interviews**

This phone interview by the external evaluator has three objectives: (1) to flesh-out and augment information provided in the reports by each of the partner organizations; (2) to determine how communication and decision-making are working for Steering Committee partners and (3) identify what partners think are the key challenges for the coming year.

**Flesh-out Information:**

**When Reviewing the Partner’s Reports, I would like to hear more about:** (This list will be developed for each partner.)

**Have you heard any great quotes that should be included in the Kellogg Report?**

**Participation in the Steering Committee:** We want to know how it’s going and what could be improved. (This is confidential - shared to comments. Will combine and report to the ET.)

**On a 1 to 5 scale where 1 is “poor” and 5 is “outstanding,” how would you rate the level and quality of communication between Steering Committee Partners? (Are you getting what you need to participate effectively?)**

	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>poor</b>	<b>Not so good</b>	<b>Adequate</b>	<b>Good</b>	<b>Outstanding</b>

Suggestions for improvement?

**How do you feel what you and your organization brings to the Steering Committee is appreciated and valued?**

Suggestions for improvement?

**What needs does your organization have important needs related to your participation in Grow Montana that are not being met?**

Suggestions for improvement?

**On a 1 to 5 scale where 1 is “poor” and 5 is “outstanding,” how would you rate the quality of decision-making by the Steering Committee? What’s working and what isn’t?**

	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>poor</b>		<b>Adequate</b>		<b>Outstanding</b>

Suggestions for improvement?

**How do you envision the Grow Montana Coalition growing in representation and numbers in the coming year?**