Marketing Channel Assessment Tool (MCAT)

Version 2.0.2

Summary Description & Instructions for Use

Updated June 16, 2011

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SUMMARY DESCRIPTION

Growing demand for local foods is presenting new opportunities for small-scale agricultural producers, but understanding the relative costs and benefits of different local foods channels is important to maximize farm performance. As a result of the conclusions reached in a cost of marketing study conducted during the summer of 2008, a tool was developed to evaluate and compare marketing channels for individual farms. The Marketing Channel Assessment Tool (MCAT) aids decision making for farmers wishing to change their marketing mix, increase profitability, or decrease the amount of labor involved in their current marketing activities.

Through the original study, it was determined that six interacting factors determine the "performance" of a marketing channel for a particular farm. A channel's performance when evaluated for an individual performance factor may seem strong, but then its performance for another factor may be very weak, making it difficult to identify which channels are best for the farm. The six performance factors for marketing channel evaluation are: Profit, Volume, Labor Required, Risk, Lifestyle Compatibility, and Associated Costs. All factors except for associated costs are measured and ranked using the MCAT.

The tool requires the farmer to track all marketing labor activities, mileage, and income for at least one week of normal, peak season business. Farmers who would like the evaluation simply need to track their marketing labor for one week, or longer, on the provided worksheets and submit the worksheets to a participating Cornell Cooperative Extension (CCE) staff member. In addition, farmers need to record their mileage and gross sales, by channel, for the same time period. It is recommended that each farm record 2-3 "snapshot" weeks throughout the season for the best results.

The Marketing Channel Assessment Tool (MCAT) is used within a programmed MS Excel workbook. MCAT evaluates each channel based on labor required, sales volume, and profit (relative to labor and travel costs). In addition, farmers rank the channels based on perceived risks and lifestyle preferences.

Evaluated Factors

*Volume (Gross Sales)***:** To compare the volumes of multiple products moved through each channel, gross sales are evaluated (i.e., price x quantity).

*Profit (Net Returns)***:** Net returns focus on the price-cost differential for each channel. Here, net returns are calculated as gross sales less labor and travel marketing costs.

Labor Required: The number of labor hours each channel demands in a typical, peak-season week.

Risk: Farmer perceptions on channel financial or business risk. Financial/business risk is defined as the probability of lost or lower-than-expected sales.

Lifestyle Preferences: Lifestyle preferences reflect how well each channel fits the farmers' overall lifestyle preferences and enjoyment of work. Lifestyle preferences are unique to the individual and can relate to a channel's labor requirements, the stressfulness of the work, how and what people are interacted with, or the style and presentation of products, etc.

FOR FURTHER INFORMATION CONTACT: Matthew LeRoux, CCE-Tompkins County, 607-272-2292, MNL28@cornell.edu, OR Todd M. Schmit, Applied Economics and Management, Cornell University, 607-255-3015, TMS1@cornell.edu.

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CONTACT: Matthew LeRoux, CCE-Tompkins County, with any questions.
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INSTRUCTIONS

When a farmer asks to have their marketing channel performance evaluated, or when recommended by CCE professionals, the following are step-by-step instructions to use with the MCAT template.

To begin, program administrators should review the *MCAT* template (Appendix A), *Supplemental Information Sheet* (Appendix B), *Labor Logs* (Appendix C), and *Farmer Consent Form* (Appendix D). For the week to be studied, you will need to collect from the farmer all employee names, pay rates, mileage, and daily gross sales specific to each marketing channel used. It is also important to a larger, statewide study, to record additional farm, management, and marketing information as detailed on the *Supplemental Information Sheet.*

Before collecting any information from the farmer, they must sign the program consent form (Appendix D). You must also return a copy of the signed consent form to the farmer participant. One *Supplemental Information Sheet* must be completed by each farm for the week of data collection. Farmers can fill out sections 1-7 on their own during the week of data collection while the rest of the sheet (sections 8-27) can be completed by interviewing the farmer(s). Supplemental information on farm and management characteristics will be important to receive to develop industry benchmarks and in evaluating important performance factors.

NOTE: Keep hard (or electronic) copies of the completed *Supplemental Information Sheet* and farmer consent form. This information should be sent to the program contact listed above, along with the MCAT template files after completing data entry and computing channel ranking.

You should give the participant farmer sufficient blank copies of the daily *Labor Logs* to distribute to all farm workers for them to fill in during the study week. Also, distribute and explain the *Labor Log Instructions* to each employee and participant to ensure proper completion of the data forms. Taking the time to explain how to fill out the sheets is critical – only accurate information will produce accurate results. Each person on the farm will probably fill-in between 1-2 sheets for each day worked.

It is a good idea to **print** these instructions and use them as you go through the template.

To collect from the farmer (*Supplemental Information Sheet*):
1. List of all people (owners, family, volunteers, and hired) involved in the marketing process and their pay rates.
2. List of all marketing channels used (the current template can assess 6 channels) and gross sales for each channel for the study week (It is best if the farm keeps daily records).
3. Mileage for each channel (It is best if the farm keeps daily records).
4. Farmer perceptions on channel financial or business risk
5. Farmer perceptions on each channel's consistency with farmer lifestyle preferences.

6. Farmer relative importance (weights) on MCAT performance criteria.
7. List of crops grown. This is a list of all the vegetable and fruit crops grown; the list is to give a sense of the diversity of crops harvested and sold.
8. Additional management and business characteristics (e.g., acres farmed, business planning and record keeping, farm owner demographics, technology use, production methods, etc.).
9. Signed participant consent form (return copy of form to participant)

To give to the farmer:
1. *Supplemental Information Sheet* (see above)
2. *Labor Log* instructions (verbal explanations to farmer and laborers encouraged).
3. Sufficient copies of blank *Labor Logs* (Pens and clipboards are helpful too).

You may want to check completed labor logs after the first day of the study week to ensure that data is being entered correctly. Once the farm has completed one week of daily *Labor Logs*, the logs should be reviewed and discussed with the participant to clarify any errors or confusion.

Now you are ready to enter data into the *MCAT* template.

DATA ENTRY INTO MCAT (VERSION 2.0.2):
File Set Up: Open the MS Excel workbook file entitled *Marketing Channel Evaluation v2.0.2.xlsx*. BEFORE you enter any data, do a "save as" with the MCAT file to a location of your choice AND including the farm name in the file name; e.g., *Marketing Channel Evaluation v2.0.2 Money Maker Farm.xlsx*.

Next, and still BEFORE you enter any data, set the Excel "Calculation Option" to "Manual". By doing this, calculations will NOT be updated in MCAT until you tell Excel to do so or you save the file. Updating the calculations (i.e., ALL calculations for ALL worksheets) may take several seconds (depending on processor speed). You may update these calculations as you go along (see below). Excel also automatically updates the calculations when you save the document.

- For PC USERS: Click the "Formulas" tab, and then click "Calculation Options" and choose "Manual". To update calculations as you enter data, click "Calculate Now" under "Formulas", or simply press 'Save'.

- For MAC USERS: On the "Excel" menu, click "Preferences" and under "Formula and Lists", click "Calculation". Next, under "Calculation Sheets", select "Manually" and click "ok". To update calculations as you enter data, press "command+=", or simply press 'Save'.

PART 1 – Farm Input
Go to the worksheet labeled **PART 1 – Farm Input** and follow the instructions listed in the worksheet. All cells requiring data entry on this worksheet are highlighted in yellow. The worksheets are protected allowing you to fill in information only where appropriate. For the worker names and marketing channels, if the number of spaces in the worksheet is not enough, (12 for workers, 6 for channels) contact the contact person listed on page 2. Also, if you have fewer channels or workers, leave the unused cells as is.

Step 1: Enter farm name as shown on the *Supplemental Information Sheet*.

Step 2: Fill in all farm worker names (up to 12) and wage rates (paid or implicit), as shown on the *Supplemental Information Sheet* (question 1). Include hired labor, owners, family, volunteers, and other unpaid workers. Start by clicking on the cell that says "Name 1" and entering the person's name. The person's name will now appear wherever it is appropriate throughout the remainder of the MCAT template. Click on "$0.00" immediately to the right of this person's name and enter his/her hourly wage rate (e.g., $7.25).

NOTE: Include in this list ALL unpaid labor as well. This includes owners, spouse, children, and volunteers. To value all labor time used, it is best to assign a value to each unpaid labor's pay rate, such as the average rate of all paid labor, a minimum wage, or an alternative level of your choosing.

Enter the starting date of the study (mm/dd/yy) where indicated, as shown on the *Supplemental Information Sheet*. All of the remaining dates and days will be filled in automatically when you "save" or click "calculate now" as described at the top of this page.

Step 3: Enter the name of each marketing channel (up to 6) that the farm participates in, as shown on the *Supplemental Information Sheet*. Start by clicking on the cell that says "Channel 1" and enter the name of the marketing channel name. The channel name will now appear wherever it is appropriate throughout the template. If the farm uses fewer than 6 general channels, you may enter specific channels or customers, such as "Tuesday Farmers' Market" and "Saturday Farmers' Market" as opposed to simply "farmers' market".

NOTE: Common marketing channels include: farmers' market, farm stand, u-pick (also called pick-your-own), grocery/retail, restaurant, distributor, CSA (Community Supported Agriculture), institution/school; and less often, produce auction, product brokers, and food processors. In addition, for on-farm value-added processing, you may list the channel as "Processing" or specific products like "Jam" or "Pies".

Step 4: Select all of the product categories that the farm is handling during the week of the study, based on the season and discussion with the farmer(s). Select all product categories (up to 14) from the drop down menu provided. Specifically, click on the cell 'product 1' and then click the down arrow shown to select a product category; continue down the product list until all categories have been entered. You may also choose to list additional products included in the spaces provided.

Manually update the calculations at this point before proceeding (see above) and/or save the template file. The channel names and dates and days should now be shown on the steps that follow.

Step 5: Input the current mileage rate and the farm's total miles traveled to and from each channel's sales location for the week of the study (i.e., round trip mileage) as shown on the *Supplemental Information Sheet* (question 3). The 2010 Internal Revenue Service mileage rate for the use of cars, vans, pickups or panel trucks for business purposes is $0.50/mile.

Step 6: Input the farm's gross sales for the week of the study as shown on the *Supplemental Information Sheet* (question 2).

NOTE: For the CSA channel, farms are paid at the beginning of the season for shares of their produce. For the purposes of this analysis, ask the farmer to place a value on the amount of produce that was distributed through the CSA channel on each share pick-up day for the week. Most farms will have a good

sense of the quantity and value of produce distributed.

NOTE: For on-farm processing (value added products, preserves) the farm is "buying" its own product for the value-added enterprise, therefore, have them assign a value to the quantity they use and track "processing" as a channel. Do not track any activity for processing beyond the regular harvest and "sale" to the processing enterprise.

Step 7: Input the farm's feelings on the perceived level of financial business risk for each channel they participate in, as shown on the *Supplemental Information Sheet* (question 4). Use a scale from 1 up to a maximum of the number of channels utilized. Financial business risk is defined as the probability of lost or lower-than-expected sales, either from unexpected changes in sales quantity or sales price. Examples could include the risks associated with 'buyer back out", lost sales due to poor weather or re-negotiated prices. The channel perceived to be least risky gets a "1", and the most risky gets a value up to the maximum number of channels utilized.

NOTE: The rankings need not be whole numbers in between the top and bottom rankings, as they will depend on how close the farm feels the channels rank relative to each other. Equal values share a rank number.

Step 8: Input the farm's feelings on how well the channel fits in with their overall lifestyle preferences and enjoyment of work as shown on the *Supplemental Information Sheet* (question 5). Use a scale from 1 up to a maximum of the number of channels utilized. Lifestyle preferences can be related to a number of factors and are unique to the individual. For example, lifestyle preferences could relate to a channel's labor hour requirements, the stressfulness of the work, how and what people are interacted with, or the style and presentation of products, etc. The channel perceived to be the most consistent with the farm's lifestyle preferences gets a "1", and the least consistent gets a value up to the maximum number of channels utilized.

NOTE: The rankings need not be whole numbers in between the top and bottom rankings, as they will depend on how close the farm feels the channels rank relative to each other.

Step 9: Input the *Factor Weights*, showing the farm's relative importance of each evaluation factor considered as shown on the *Supplemental Information Sheet* (question 6). The factors considered are Total Sales Volume, Percent Profit Margin, Labor Requirements, Risk, and Lifestyle Preferences. Based on the data provided above, the computed factor values and rankings are shown in PART 5.

The weights summed over all MCAT factors MUST sum to one! So if all five factors are equally valued, they should each receive the same weight, or 0.20. However, if the farm feels that some factors are more important to them than others (e.g., volume or risk), then the factor weights should vary, with more important factors receiving relatively higher weights than those less important. Each weight must be from zero to one, and they must sum to one. The default selection has equal weights for all five factors (0.20).

Manually update the calculations at this point before proceeding (see above) and/or save the template file. The required information will be transferred to the applicable worksheets.

PART 2 – Labor Log
Go to the worksheet labeled **PART 2 – Labor Log Input** and follow the instructions listed in the

worksheet. The worksheets are protected allowing you to fill in information only where appropriate.

Step 10: Enter information from the daily labor logs below from each employee listed in PART 1. You MUST use the drop down menus for "Employee name", "Day", "Product", "Activity", and "Marketing Channel". Enter all labor time in MINUTES

NOTE: Each of the activities on the Labor Log is grouped into the four basic steps of marketing. See illustration below. Specifically, the individual activities on the labor logs should be grouped into one of four aggregate activities in the MCAT template, or:

- **Harvest:** *Create pick list* and *Harvest*;
- **Process & Pack:** *Cull/grade/sort/wash*, *Bunch/bag/package/pack orders/boxes*, L*oad/unload truck*;
- **Travel:** '*Travel to/from market/make deliveries';* and
- **Sales & Bookkeeping:** '*Bookkeeping/Bills', 'Sales calls', 'Sales Time/Set up/Take down'*.
- If 'Other' is checked, try to discern if it belongs in one of the categories, shouldn't be tracked (such as production activities) or contact us with questions.

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NOTE: For labor logs selecting more than one activity (or channel), enter the data as separate entries in the spreadsheet by dividing the time evenly between the activities (or channels), unless otherwise instructed (e.g., based on subsequent interviews with employees), and note it on the worksheet. Your notes will allow consistent records and avoid confusion. You may want to use address labels for your notes, so they are clearly visible (see example below).

If the type of product was not entered on the labor log sheet, leave the "Product" cell blank. Also, you may leave optional notes to clarify your entries if needed.

You are now done entering data for the MCAT rankings.

Manually update the calculations at this point before proceeding (see above) and/or save the template file. The required information will be transferred to the applicable worksheets.

PART 3 – Labor Log Review
Go to the worksheet labeled **PART 3 – Labor Log Review** and review the summarized employee labor information collected during the study week. These data are automatically generated based on the labor data entered in PARTS 1 & 2. Unused employee listings will be left blank. No data entry is necessary on this sheet.

Step 11: Review labor data for the study week, by day and marketing activity for each employee.

Step 12: Review labor data for study week, by marketing channel and marketing activity for each employee.

Manually update the calculations at this point before proceeding (see above) and/or save the template file. The required information will be transferred to the applicable worksheets.

PART 4 – Farm Data Review
Go to the worksheet labeled **PART 4 – Farm Data Review** and review the summarized farm labor information collected during the study week. No data entry is necessary on this sheet.

Step 13: Review and compare each person's totals HOURS (converted from minutes), by activity and channel.

Step 14: Review the farm's labor HOUR totals. This is how many hours were devoted to specific marketing activities or channels.

Step 15: Review the farm's labor COSTS by marketing channel and employee.

Step 16: Review and compare the Gross Sales and Profit statistics for each marketing channel.

Manually update the calculations at this point before proceeding (see above) and/or save the template file. The required information will be transferred to the applicable worksheets.

PART 5 – Channel Ranking
Go to the worksheet labeled **PART 5 – Channel Ranking** and review the individual and final composite rankings computed for each of the marketing channels utilized. No data entry is necessary on this sheet. The "simple" rankings are from 1 to the number of channels utilized, ranked from 'best' to 'worst', and only in whole numbers. The "scaled" rankings are also from 1 to the number of channels utilized and take into consideration how far apart the measured data are from each other. Equal values share a rank number.

Step 17: Review the computed rankings for **Sales Volume** based on data entered in Part 1 and Part 2.

Step 18: Review the computed rankings for **Labor Requirements** based on data entered in Part 1 and Part 2.

Step 19: Review the computed rankings for **% Profit of Gross Sales** based on data entered in Part 1 and Part 2. The rank is based on sales volume, labor requirements, wage rates, and mileage costs.

Step 20: Review the farm's rankings on the level of perceived **Financial Business Risk** of each channel based on the data entered in Part 1. The channel perceived to be least risky gets a "1", and the most risky gets a value up to the maximum number of channels utilized.

Step 21: Review the farm's rankings on the consistency of each channel with their overall **Lifestyle Preferences** based on the data entered in Part 1. The channel perceived to be most consistent gets a "1", and the least consistent gets a value up to the maximum number of channels utilized.

Step 22: Review the composite **Final Ranking Scores** indicating the relative performance of each of the marketing channels utilized. The lowest score represents the farm's "best" performing channel based on the five factors evaluated. If all five factors are equally valued, the final rankings in the "Unweighted" and "Weighted" columns will be the same. If the farm weights some factors more than others, then the final rankings are shown in the "Weighted" column.

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Post Ranking Exercises

Once you have reviewed the data and the final rankings, share them with the farmer managers/owners. The data may or may not suggest a change in marketing, such as a reduction or elimination of the farm's participation in the "worst" performing channel and an increase in the farm's participation in the "best" performing channel.

The Excel spreadsheet can also be used to estimate the impact of marketing changes. Once the baseline data is all entered, parameters can be changed to see their impact on the final ranking. It is recommended to do a "save as" and give the file a new name when forecasting changes, this way, the original data remains intact.

For example, when one farm saw that a certain farmers' market they sold at performed very weakly for them, they wanted to see how it would change if they had a higher level of gross sales at that market. That change was made by entering a higher gross sales number in Step 6 so the farmers could see how the ranking changed. Other factors that can be changed to test their impact are labor, risk, the weights of the factors, and others. Using a few simple calculations, you can determine the amount of labor that might be saved, and the impacts of other decisions.

APPENDIX A. Marketing Channel Assessment Tool Excel Template
PART 1 – Farm Input

Name and description of marketing activities on each farm

Activity	Description
Harvest	Create Pick List, Harvest
Process & Pack	Cull, Grade, Sort, Wash, Bunch, Bag, Package, Pack orders/boxes
Travel & Delivery	Load/unload truck, Travel to/from market, Make deliveries
Sales & Bookkeeping	Bookkeeping, Bills, Sales calls, Sales time set up/take down

All activities included on the labor logs are assigned to one of the four categories shown here. When entering labor log data, follow this categorization by selecting these activites from the drop down menu.

Step 1. Enter Farm name

Farm name

Step 2. Enter starting date of study (mm/dd/yy) in the yellow box below (clicking F9, updating calculations, or saving the document will automatically fill in the rest of the cells). Also, list all workers on the farm and their wage rate (paid or implicit). Include hired labor, owners, family, volunteers, and other unpaid workers.

Employee Name	Pay rate ($/hour)
Name 1	$0.00
Name 2	$0.00
Name 3	$0.00
Name 4	$0.00
Name 5	$0.00
Name 6	$0.00
Name 7	$0.00
Name 8	$0.00
Name 9	$0.00
Name 10	$0.00
Name 11	$0.00
Name 12	$0.00

Start date (mm/dd/yy)	Day
mm/dd/yy	mm/dd/yy
#VALUE!	#VALUE!
#VALUE!	#VALUE!
#VALUE!	#VALUE!
#VALUE!	#VALUE!
#VALUE!	#VALUE!
#VALUE!	#VALUE!

Note: While farm owners and some family members may not be paid, it is best to estimate a value for their time or to use the rate from the highest or average of hired help.

Step 3. Enter the name of each marketing channel the farm participates in.

List marketing channels
Channel 1
Channel 2
Channel 3
Channel 4
Channel 5
Channel 6

Sample Channels	
Farmers' Market	Distributor
Farm stand	CSA
U-pick	Institution/ school
Grocery/retail	Produce Auction
Restaurant	Processing (on-farm)

Step 4. Select crops grown on the farm, by product category. Click on the product cells in column "A" and select a product category from the drop-down menu.

Lists of Products	Product Categories	Example of Products	List additional products if needed for these categories, or other notes.
product 1	Berries	Raspberry, Blueberry, Strawberry, Gooseberry, Blackberry, Currant, Elderberry, Grape	
product 2	Stone fruits (Drupe)	Cherry, Peach, Plum, Apricot, Nectarine	
product 3	Pome Fruits	Apple, Asian pears, pear	
product 4	Botanical Fruits	Cucumber, Tomato, Tomatillo, Sweet pepper, Hot pepper, Eggplant, Okra	
product 5	Melons	Watermelon, Cantelope, Muskmelon, Melon	
product 6	Root Vegetables	Potato, Radish, Daikon, Carrot, Beets, Kohlrabi, Turnip, Rutaaga, Parsnips, Fennel, Celeriac, Onion, Scallion, Garlic	
product 7	Leaf Vegetables	Collard greens, Escarole, Bok choy, Pac choi, Arugula, Head lettuce, Leaf lettuce, Basil, Parsley, Cilantro, Mixed baby cooking greens, Mixed baby salad greens, Bean Sprouts, Rhubarb	
product 8	Flower buds	Broccoli, Cauliflower,	
product 9	Seed Crops	Sweet corn, Beans, Peas	
product 10	Squash	Summer squash, zuchinni, winter squash, acorn squash, delicatto squash, butternut squash, pumpkin	
product 11	Syrups	Honey, Maple Syrup	
product 12	Flowers	Edible flowers, inedible flowers	
product 13	Other Fruits	list others if needed	
product 14	Other Vegetables/Herbs	list others if needed	

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Step 5. Input the farm's total miles traveled for each channel during the week of the study and enter the mileage cost rate ($/mile). The default mileage rate is $0.55/mile.

Mileage Cost Rate ($/mile)
$0.55

Marketing Channel	Total Miles Traveled (miles)	Mileage Cost
Channel 1	0.00	$0.00
Channel 2	0.00	$0.00
Channel 3	0.00	$0.00
Channel 4	0.00	$0.00
Channel 5	0.00	$0.00
Channel 6	0.00	$0.00
Total	0.00	$0.00

Step 6. Input the farm's gross sales for the week of the study.

Start Date MM/DD/YY	Day	Channel 1	Channel 2	Channel 3	Channel 4	Channel 5	Channel 6	Total
mm/dd/yy	mm/dd/yy	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
#VALUE!	#VALUE!	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	Total	XX	XX	XX	XX	XX	XX	$0.00

Step 7. Input the farm's feelings on the perceived level of *financial business risk* for each channel. The channel perceived to be least risky gets a "1", and the most risky gets a value *up to* the maximum number of channels utilized. (Equal values share a rank number). Note, rankings need not be whole numbers, and rank numbers close to each other represent levels of perceived risk that are relatively similar.

Market Channel	Enter Rank
Channel 1	0
Channel 2	0
Channel 3	0
Channel 4	0
Channel 5	0
Channel 6	0

Note: In a survey of 14 farms, farmers ranked the channels for risk as follows. (1 = lowest risk, 5 = highest risk).	
CSA	1
U-pick w/farm stand	2
Farm Stand	3
Farmers' Market	4
Wholesale	5

Step 8. Input the farm's feelings on how well each channel fits in with their *overall lifestyle preferences*. The channel perceived to be most consistent gets a "1", and the least consistent gets a value *up to* the maximum number of channels utilized. (Equal values share a rank number). Note, rankings need not be whole numbers, and rank numbers close to each other represent levels of fit with lifestyle preferences that are relatively similar.

Market Channel	Enter Rank
Channel 1	0
Channel 2	0
Channel 3	0
Channel 4	0
Channel 5	0
Channel 6	0

For example, a farm that does not care for customer interaction or 'face time' with consumers might rank the following channels as (1 = most consistent with preferred lifestyle, 4 = least consistent with preferred lifestyle).	
Staffed U-pick	3
Non-staffed Farm Stand	1
Farmers' Market	4
Wholesale	2

Step 9. Input the farm's *Factor Weights* representing the farm's view of relative importance of each channel evaluation factor considered. The weights over all channel factors MUST sum to one! The default selection has equal weights for all five factors (0.20).

	Channel Evaluation Factor				
	Total Sales Volume	Percent Profit Margin	Labor Requirements	Business Risk	Lifestyle Preference
Factor Weights	0.20	0.20	0.20	0.20	0.20

Check! Is the sum below equal to one?
sum= 1.00

APPENDIX A. Marketing Channel Assessment Tool Excel Template
PART 2 – Labor Log Input

FARM NAME: Farm name

Step 10. Enter information from labor log sheets below from each employee listed in PART 1. You MUST use the drop down menus for "Employee name", "Day", "Product", "Activity", and "Marketing Channel". For labor logs selecting more than one activity (or channel), separate entry rows should be made by dividing the time evenly between the activities (or channels), unless otherwise instructed. If the type of product was not entered on the labor log sheet, leave the "Product" cell blank. You may leave optional notes to clarify your entries if needed.

Employee name	Day	Product	Activity	Marketing Channel	Time (Minutes)	Optional Note

APPENDIX A. Marketing Channel Assessment Tool Excel Template
PART 3 – Labor Log Review

Step 11. Review labor data for study week, by day and marketing activity for each employee. These data are automatically generated based on the labor data entered in PART 2.

Name 1	Date MM/DD/YY	Day	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	mm/dd/yy	mm/dd/yy	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
Total Hours:	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
		Total	0.00	0.00	0.00	0.00	0.00

Name 2	Date MM/DD/YY	Day	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	mm/dd/yy	mm/dd/yy	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
Total Hours:	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
		Total	0.00	0.00	0.00	0.00	0.00

Name 3	Date MM/DD/YY	Day	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	mm/dd/yy	mm/dd/yy	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
Total Hours:	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	01/00/00	Total	0.00	0.00	0.00	0.00	0.00

Name 4	Date MM/DD/YY	Day	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	mm/dd/yy	mm/dd/yy	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
Total Hours:	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
		Total	0.00	0.00	0.00	0.00	0.00

Name 5	Date MM/DD/YY	Day	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	mm/dd/yy	mm/dd/yy	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
Total Hours:	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
0.00	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
	#VALUE!	#VALUE!	0.00	0.00	0.00	0.00	0.00
		Total	0.00	0.00	0.00	0.00	0.00

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Step 12. Review labor data for study week, by marketing channel and marketing activity for each employee. These data are automatically generated based on the labor data entered in PART 2.

Name 1	Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	Channel 1	0.00	0.00	0.00	0.00	0.00
0.00	Channel 2	0.00	0.00	0.00	0.00	0.00
	Channel 3	0.00	0.00	0.00	0.00	0.00
Total Hours:	Channel 4	0.00	0.00	0.00	0.00	0.00
0.00	Channel 5	0.00	0.00	0.00	0.00	0.00
	Channel 6	0.00	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00	0.00

Name 2	Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	Channel 1	0.00	0.00	0.00	0.00	0.00
0.00	Channel 2	0.00	0.00	0.00	0.00	0.00
	Channel 3	0.00	0.00	0.00	0.00	0.00
Total Hours:	Channel 4	0.00	0.00	0.00	0.00	0.00
0.00	Channel 5	0.00	0.00	0.00	0.00	0.00
	Channel 6	0.00	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00	0.00

Name 3	Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	Channel 1	0.00	0.00	0.00	0.00	0.00
0.00	Channel 2	0.00	0.00	0.00	0.00	0.00
	Channel 3	0.00	0.00	0.00	0.00	0.00
Total Hours:	Channel 4	0.00	0.00	0.00	0.00	0.00
0.00	Channel 5	0.00	0.00	0.00	0.00	0.00
	Channel 6	0.00	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00	0.00

Name 4	Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	Channel 1	0.00	0.00	0.00	0.00	0.00
0.00	Channel 2	0.00	0.00	0.00	0.00	0.00
	Channel 3	0.00	0.00	0.00	0.00	0.00
Total Hours:	Channel 4	0.00	0.00	0.00	0.00	0.00
0.00	Channel 5	0.00	0.00	0.00	0.00	0.00
	Channel 6	0.00	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00	0.00

Name 5	Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Total
Total Minutes:	Channel 1	0.00	0.00	0.00	0.00	0.00
0.00	Channel 2	0.00	0.00	0.00	0.00	0.00
	Channel 3	0.00	0.00	0.00	0.00	0.00
Total Hours:	Channel 4	0.00	0.00	0.00	0.00	0.00
0.00	Channel 5	0.00	0.00	0.00	0.00	0.00
	Channel 6	0.00	0.00	0.00	0.00	0.00
	Total	0.00	0.00	0.00	0.00	0.00

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APPENDIX A. Marketing Channel Assessment Tool Excel Template
PART 4 – Farm Data Review

FARM NAME: Farm name

Step 13. Review and compare each person's totals hours (converted from minutes), by activity and channel.

					These two columns should show equal values.		
Employee	Harvest	Process & Pack	Travel & Delivery	Sales & Bookkeeping	Mktg. channel time card	Daily time card	Test for Errors
Name 1	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 2	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 3	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 4	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 5	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 6	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 7	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 8	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 9	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 10	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 11	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Name 12	0.00	0.00	0.00	0.00	0.00	0.00	Correct
Farm Total:	0.00	0.00	0.00	0.00	0.00	0.00	Correct

	Channel 1	Channel 2	Channel 3	Channel 4	Channel 5	Channel 6	
Employee	Channel 1	Channel 2	Channel 3	Channel 4	Channel 5	Channel 6	Total
Name 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 11	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name 12	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Farm Total:	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Step 14. Review the farm's labor hour totals devoted to specific marketing activities or channels.

Marketing Channel	Harvest	Process & Pack	Travel & Delivery	Sales & Book.	Farm Total
Channel 1	0.00	0.00	0.00	0.00	0.00
Channel 2	0.00	0.00	0.00	0.00	0.00
Channel 3	0.00	0.00	0.00	0.00	0.00
Channel 4	0.00	0.00	0.00	0.00	0.00
Channel 5	0.00	0.00	0.00	0.00	0.00
Channel 6	0.00	0.00	0.00	0.00	0.00
Farm Total	0.00	0.00	0.00	0.00	0.00

Step 15. Review the farm's labor costs by marketing channel and employee.

Employee	Pay Rate	Channel 1	Channel 2	Channel 3	Channel 4	Channel 5	Channel 6
Name 1	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 2	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 3	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 4	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 5	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 6	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 7	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 8	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 9	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 10	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 11	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Name 12	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Farm Total:	■	XX	XX	XX	XX	XX	XX

Step 16. Review and compare the Gross Sales and Profit statistics for each marketing channel.

Marketing Channel	Channel Sales % of Total Sales	Channel Labor % of Total Labor	Channel Mileage % of Total Mileage	Profit $	Profit % of Sales	Sales per Hour of Labor	Profit $ per hour of Labor
Channel 1	XX	XX	XX	XX	XX	XX	XX
Channel 2	XX	XX	XX	XX	XX	XX	XX
Channel 3	XX	XX	XX	XX	XX	XX	XX
Channel 4	XX	XX	XX	XX	XX	XX	XX
Channel 5	XX	XX	XX	XX	XX	XX	XX
Channel 6	XX	XX	XX	XX	XX	XX	XX
Total or Average	0.0%	0.0%	0.0%	$0.00	XX	XX	XX
	Total	Total	Total	Total	Average	Average	Average

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APPENDIX A. Marketing Channel Assessment Tool Excel Template
PART 5 – Channel Ranking

FARM NAME: Farm name

Step 17. Review the computed Rankings for Sales Volume based on data entered in Part 1 and Part 2. The "simple" rankings are from 1 to the number of channels utilized, ranked from 'best' to 'worst', and only in whole numbers. The "scaled" rankings are also from 1 to the number of channels utilized, but consider how far apart the gross sales numbers are from each other.

	Total Gross Sales	Simple Rank	Scaled Rank		Rank Ordering:	
Channel 1	XX	#VALUE!	#VALUE!		1	Best
Channel 2	XX	#VALUE!	#VALUE!		0	Worst
Channel 3	XX	#VALUE!	#VALUE!			
Channel 4	XX	#VALUE!	#VALUE!			
Channel 5	XX	#VALUE!	#VALUE!			
Channel 6	XX	#VALUE!	#VALUE!			

Step 18. Review the computed Rankings for Labor Requirements based on data entered in Part 1 and Part 2. The rank is based on the total number of labor hours used in each channel. The "simple" rankings are from 1 to the number of channels utilized, ranked from 'best' to 'worst', and only in whole numbers. The "scaled" rankings are also from 1 to the number of channels utilized, but consider how far apart the required labor hours are from each other.

	Total Labor Hours	Simple Rank	Scaled Rank
Channel 1	XX	#VALUE!	#VALUE!
Channel 2	XX	#VALUE!	#VALUE!
Channel 3	XX	#VALUE!	#VALUE!
Channel 4	XX	#VALUE!	#VALUE!
Channel 5	XX	#VALUE!	#VALUE!
Channel 6	XX	#VALUE!	#VALUE!

Step 19. Review the computed Rankings for % Profit of Gross Sales based on data entered in Part 1 and Part 2. The rank is based on sales volume, labor requirements, wage rates, and mileage costs. The "simple" rankings are from 1 to the number of channels utilized, ranked from 'best' to 'worst', and only in whole numbers. The "scaled" rankings are also from 1 to the number of channels utilized, but consider how far apart the profit numbers are from each other.

	% Profit of Sales	Simple Rank	Scaled Rank
Channel 1	XX	#VALUE!	#VALUE!
Channel 2	XX	#VALUE!	#VALUE!
Channel 3	XX	#VALUE!	#VALUE!
Channel 4	XX	#VALUE!	#VALUE!
Channel 5	XX	#VALUE!	#VALUE!
Channel 6	XX	#VALUE!	#VALUE!

Step 20. Review the farm's rankings on the level of perceived Financial Business Risk of each channel based on the data entered in Part 1. The channel perceived to be least risky gets a "1", and the most risky gets a value up to the maximum number of channels utilized. (Equal values share a rank number).

	Financial Risk
Channel 1	0.00
Channel 2	0.00
Channel 3	0.00
Channel 4	0.00
Channel 5	0.00
Channel 6	0.00

Step 21. Review the farm's rankings on channel consistency with their overall Lifestyle Preferences based on the data entered in Part 1. The channel perceived to be most consistent gets a "1", and the least consistent gets a value up to the maximum number of channels utilized. (Equal values share a rank number).

	Lifestyle
Channel 1	0.00
Channel 2	0.00
Channel 3	0.00
Channel 4	0.00
Channel 5	0.00
Channel 6	0.00

Step 22. Review the Final Ranking Scores for each of the Marketing Channels that you use. The lowest score represents the farm's "best" performing channel based on the four factors evaluated. If all five factors are equally valued, the final rankings in the "Unweighted" and "Weighted" columns will be the same. If the farm weights some factors more than others, then the final rankings are shown in the "Weighted" column.

Marketing Channel	Sales Volume Rank	Labor Hours Rank	Profit Margin Rank	Financial Risk Rank	Lifestyle Rank	Final Scores Unweighted	Final Scores Weighted
Channel 1	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Channel 2	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Channel 3	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Channel 4	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Channel 5	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Channel 6	#VALUE!	#VALUE!	#VALUE!	0.0	0.0	#VALUE!	#VALUE!
Factor Weighting	0.20	0.20	0.20	0.20	0.20		

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APPENDIX B. Marketing Channel Assessment Tool – Supplemental Information

Marketing Channel Assessment Study - Supplemental Information Sheet

Farm Name: _____   **Start Date:** _____

All information will be kept strictly confidential. When reported to anyone but your farm, information and results will be aggregated with other farm data.

1. Please list all people that worked on the farm during the studied week, including owners, family, friends, salaried staff, hourly staff, and volunteers (CSA work-shares and others). For hired labor, please write in their rate. For unpaid, denote their relationship to the farm.

Number	Name	Rate/Relationship
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

2. Please list the week's gross sales for each day, for each channel as specifically as possible. For CSA shares, please estimate the value of all produce harvested for distribution. For produce that you will process for value-added products, please also estimate the value of what you will process. For wholesale sales, write in the amount invoiced.

Channel	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

3. Please list the week's total mileage for each day, for each channel.

Channel	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

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4. Please rank your feelings on the perceived financial riskiness of each channel. Financial (business) risk is defined as the probability of lost or lower-than-expected sales. The channel perceived to be the LEAST risky gets a "1", and the channel perceived to be the MOST risky gets a value UP TO the maximum number of channels. Rankings need not be whole numbers, and if you feel that two channels are equally risky, assign them the same number.

Channel →						
Risk Rank						

5. Please rank your feelings on how well each channel fits with your overall lifestyle preferences and enjoyment of work. Lifestyle preferences are unique to the individual and can relate to a channel's labor requirements, the stressfulness of the work, how and what people are interacted with, or the style and presentation of products, etc. The channel perceived to be the MOST consistent with your lifestyle preferences gets a "1", and the least consistent channel gets a value UP TO to the maximum number of channels. Rankings need not be whole numbers, and if you feel that two channels are equally consistent, assign them the same number.

Channel →						
Lifestyle Rank						

6. Please assign a "weight" to the importance that you feel each factor used to evaluate a marketing channel deserves. For example, if you don't care about profit and are very concerned about how much labor a channel takes, you would assign a low weight to "profit", and a high weight to "labor required." The sum of all weights must equal one (1). An example is provided.

Factor →	Unit Profit	Labor Required	Business Risk	Lifestyle Preferences	Product Volume	Sum
Weight (example)	0.10	0.40	0.10	0.20	0.20	= 1
Weight YOURS						= 1

7. Please check all the crops that you grow for market. (Write in any that are missing).

☐ Raspberries	☐ Asparagus	☐ Daikon	☐ Garlic	☐ Mixed baby cooking greens
☐ Blueberries	☐ Sweet corn	☐ Carrots	☐ Cabbage	☐ Mixed baby salad greens
☐ Strawberries	☐ Tomatoes	☐ Beets	☐ Broccoli	☐ Head lettuce
☐ Gooseberries	☐ Tomatillo	☐ Kohlrabi	☐ Cauliflower	☐ Leaf lettuce
☐ Blackberries	☐ Sweet peppers	☐ Watermelon	☐ Brussels sprouts	☐ Bean sprouts
☐ Currants	☐ Hot peppers	☐ Melon	☐ Kale	☐ Honey
☐ Elderberries	☐ Eggplant	☐ Rhubarb	☐ Swiss Chard	☐ Maple Syrup
☐ Cherries	☐ Okra	☐ Cucumbers	☐ Spinach	☐ Edible flowers
☐ Grapes	☐ Potatoes	☐ Turnip	☐ Collard greens	☐ Other herbs # var. ____
☐ Peaches	☐ Beans	☐ Rutabaga	☐ Escarole	☐ Cut flowers # var. ____
☐ Plums	☐ Peas	☐ Parsnips	☐ Bok choy	☐ _____
☐ Apricots	☐ Summer squash	☐ Fennel	☐ Pac choi	☐ _____
☐ Nectarines	☐ Winter squash	☐ Celeriac	☐ Arugula	☐ _____
☐ Apples	☐ Pumpkin	☐ Onion	☐ Basil	☐ _____
☐ Asian pears	☐ Celery	☐ Scallions	☐ Parsley	☐ _____
☐ Pears	☐ Radish	☐ Leeks	☐ Cilantro	☐ _____

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Additional Management and Business Characteristics

8. Total acres in production: _____

9. Do you currently own or rent land for production? Please provide breakdown of acres if both.

    Own: __Yes __No   Rent: __Yes   __No

    Own: ____Acres owned   Rent: ____Acres rented

10. Do you raise livestock? If yes, what is the average number of head on your farm?

    Livestock: ___Yes   ___No

    Number: ___Dairy   ___Beef   ___Hogs   ___Poultry   ___Goats/Sheep   ___Other

11. Age of farm owner: _____   Age of farm owner spouse/partner: _____

12. Do you have a written business plan for your farming operation?

    Have a written business plan: ___Yes   ___No

13. What type of business record keeping system do you currently use? (check one)

____Account books   ____Accounting service   ____On-farm computer program   ____Other:

14. Is farming your full-time profession? (check one).

____Full-time farmer   ____Part-time farmer   ____Hobby/retired farmer   ____Other:

15. On average, what percent of your total household income is earned from farming operations?

    ____Farm percent of total household income

16. Where does your last year's total household income fall in the following ranges?

___Less than $15,000   ___$15,000 to $29,999   ___$30,000 to $49,999   ___$50,000 to $69,999

___$70,000 to $99,999   ___$100,000 and above

17. Select highest educational degree completed by farm owner or spouse/partner, whichever is higher. (select one)

___Some high   ___High school   ___Some   ___Technical   ____Bachelor   ____Advanced or
  school   degree   college   college deg.   degree   prof. degree

18. What type of business ownership is related to your farm? (select one)

___Sole Proprietorship   ___Partnership   ___LLC   ____Corporation   ____Other:

19. Which of the following categories best describes you and your spouse/partner's racial-ethnic identity? (select at most one for each column)

Racial-Ethnic Identity	You	Spouse/Partner
White/Caucasian, European American, Non-Hispanic		
Hispanic or Latino American		
American Indian		
Asian, Asian American		
Black, African American, Non-Hispanic		
Middle Eastern, Middle Eastern American		
Pacific Islander		
Other		

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20. Do you use mechanized harvesting technologies on your farm? If yes, what percent of total acres is harvested mechanically?

      Use mechanical harvesting: __Yes   __No

      Percent of total acres harvested mechanically: ___%

21. Do you use mechanized processing technologies on your farm; e.g., for culling, grading, sorting, washing, or packaging? If yes, what percent of total product volume is processed mechanically?

      Use mechanical processing: __Yes   __No

      Percent of total product volume processed mechanically: ___%

22. What production methods are employed on your farm? (check all that apply) Indicate percent of total product volume produced under each method and whether the volume has increased (I), decreased (D), or stayed about the same (S) over the last year.

      ___Conventional production   ___% of total volume   ___Volume change

      ___Certified organic production   ___% of total volume   ___Volume change

      ___Non-certified organic production   ___% of total volume   ___Volume change

      ___Transitioning to organic production   ___% of total volume   ___Volume change

23. Do you sell value-added products such as baked goods, preserves, other processed food products, or dried flowers? If yes, what is the average percent of total farm sales from value-added/processed products?

      Sell value-added/processed products: ___Yes   ___No

      Average percent of total farm sales: ___%

24. On average, how many weeks per year do you market your farm products through each marketing channel?

Channel →						
Weeks Marketed						

25. Indicate what marketing and promotion methods you use to promote the sale of your farm products. (check all that apply)

☐ Website	☐ Free samples/taste testing	☐ Recipies
☐ Print advertising	☐ Product signage (infor., price)	☐ Other: _____
☐ Television advertising	☐ Roadside signage	☐ Other: _____
☐ Radio advertising	☐ Bulk discounts	☐ Other: _____

26. Rank the top three methods that best describe how you normally price your products. Indicate "1" the most important method, "2" the second most important, and "3" the next most important. Select top three only.

        ___Grocery store comparison

        ___Match other vendors' prices

        ___Price below other vendors

        ___Price above other vendors

        ___Cost of production plus mark-up

        ___Charge the same always

        ___Other:_____

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27. On average, what percent of total product SALES is marketed through each channel each year? Similarly, on average, what percent of total product VOLUME is marketed through each channel each year. Finally, if we assign average prices to a wholesale packer or distributor as the base, what percent mark-up (or mark-down) is applied, on average, to product prices for each of the channels you utilize? For example, if farm stand prices are priced 20% above distributor prices (on average), assign a value of +20; if prices are 10% below distributor prices, assign a value of -10.

Channel →						
Percent of total dollar sales						
Percent of total product volume						
Percent mark-up (down) from wholesale packer or distributor						

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APPENDIX C. Sample Labor Log Sheets and Instructions

Farm Name: _____ **Worker Name:** _____ **Date:** _____

Time spent (to nearest 5 min): _____ **Vegetable(s):** _____

Activity: Check all that apply

◯ Create Pick list ◯ Harvest ◯ Cull/grade/sort/wash ◯ Bunch/Bag/Package/Pack orders/boxes

◯ Load/unload truck ◯ Travel to/from market/make deliveries ◯ Bookkeeping/Bills

◯ Sales calls ◯ Sales Time/Set up/Take down ◯ Other (please describe)_____

Product Destination: Check all that apply (when possible, please write name of biz)

◯ CSA ◯ Restaurant _____

◯ Farmers' Market ◯ Other _____

Time spent (to nearest 5 min): _____ **Vegetable(s):** _____

Activity: Check all that apply

◯ Create Pick list ◯ Harvest ◯ Cull/grade/sort/wash ◯ Bunch/Bag/Package/Pack orders/boxes

◯ Load/unload truck ◯ Travel to/from market/make deliveries ◯ Bookkeeping/Bills

◯ Sales calls ◯ Sales Time/Set up/Take down ◯ Other (please describe)_____

Product Destination: Check all that apply (when possible, please write name of biz)

◯ CSA ◯ Restaurant _____

◯ Farmers' Market ◯ Other _____

Time spent (to nearest 5 min): _____ **Vegetable(s):** _____

Activity: Check all that apply

◯ Create Pick list ◯ Harvest ◯ Cull/grade/sort/wash ◯ Bunch/Bag/Package/Pack orders/boxes

◯ Load/unload truck ◯ Travel to/from market/make deliveries ◯ Bookkeeping/Bills

◯ Sales calls ◯ Sales Time/Set up/Take down ◯ Other (please describe)_____

Product Destination: Check all that apply (when possible, please write name of biz)

◯ CSA ◯ Restaurant _____

◯ Farmers' Market ◯ Other _____

Name and date are important. Fill out as many sheets in a day as it takes to document each distinct activity.

I am only really interested in activities that occur from harvest on. I do not need any record of production activities.

Name: _____   **Date:** _____

Time spent (to nearest 15 min): _____   Vegetable(s): _____

Activity: Check all that apply

◯ Harvest   ◯ Cull/grade/sort/wash   ◯ Bunch/Bag/Package   ◯ Pack orders/boxes

◯ Bookkeeping/Bills   ◯ Travel to market   ◯ Deliveries   ◯ Sales calls

◯ Other (please describe) _____

Product Destination: Check all that apply (for bottom row, please write name of biz)

◯ CSA   ◯ Farmers' Market   ◯ Farm Stand   ◯ Other _____

◯ Grocery Store   ◯ Restaurant   ◯ Distributor   _____

Check one or two activities depending on what you were doing. Just see how time and activities are naturally divided up during the day.

You will know where the product is destined. If you are handling something that is going to more than one place, check more and I will find out what is going where from the manager's records.

Please write the name of the specific store, restaurant, or distributor if known.

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APPENDIX D. Marketing Channel Assessment Tool Consent Form

Marketing Channel Performance Study Consent Form

We are asking you to participate in a research study. This form is designed to give you information about this study. We will describe this study to you and answer any of your questions.

Project Title: Evaluating marketing channel performance for small- and medim-sized farming operations

Principle Investigator: Todd M. Schmit
  Charles H. Dyson School of Applied Economics and Management
  Cornell University
  248 Warren Hall, Ithaca, NY 14853-7801
  Phone: 607-255-3015 (work), 607-592-2316 (cell)

What the study is about
The purpose of this study is to evaluate alternative market channels utilized by smaller scale farming operations in New York State and how marketing costs and returns vary by channel across various spatial, demographic, and market characteristics.

What we will ask you to do
Producers interested in evaluating their own marketing channel performance can sign up with a participating Cornell Cooperative Extension educator to utilize the *Marketing Channel Analysis Tool* software templates, data collection forms, and detailed instructions provided. With the possible exception of clarifying any issues in the original data collected, there are no additional activities required by you.

Risks and discomforts
We do not anticipate any risks from participating in this research.

Benefits
Through your participation, you will gain increased insight into your firm's profitability through eeach way that you sell your products.

Payment for Participation
No supplemental compensation will be provided.

Privacy/Confidentiality
Your information will be confidential. The records of this study will be kept private. In any sort of report we make public, we will not include any information that will make it possible to identify you. Research records will be kept in a locked file; only project investigators will have access to the records.

Taking part is voluntary
Taking part in this study is completely voluntary. You may refuse to participate before the study begins, discontinue at any time, or skip any questions/procedures that may make you feel uncomfortable, with no penalty to you, no effect on the compensation earned before withdrawing, and no effect on the relationship you have with Cornell University and Cornell Cooperative Extension.

If you have questions
The main researcher conducting this study is Todd Schmit, a professor at Cornell University. Please ask any questions you have now. If you have questions later, you may contact Todd Schmit at tms1@cornell.edu or 607-255-3015. If you have any questions or concerns regarding your rights as a subject in this study, you may contact the Institutional Review Board (IRB) for Human Participants at 607-255-5138 or access their website at http://www.irb.cornell.edu. You may also report your concerns or complaints anonymously through Ethicspoint online at http://www.hotline.cornell.edu or by calling toll

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free at 1-866-293-3077. Ethicspoint is an independent organization that serves as a liaison between the University and the person bringing the complaint so that anonymity can be ensured.

You will be given a copy of this form to keep for your records.

Statement of Consent: I have read the above information, and have received answers to any questions I have asked. I consent to take part in the study.

Your Signature _____   Date _____

Your Name (printed) _____

Signature of person obtaining consent _____   Date _____

Printed name of person obtaining consent _____

This consent form will be kept by the researcher for at least five years beyond the end of the study