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# Value Chain Coordination

# 101

Foundations of Value Chain  
Coordination -

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Wallace Center  
AT WINROCK INTERNATIONAL

FOOD SYSTEMS  
LEADERSHIP NETWORK

# Introductions and Guiding Principles

# Why we are here:

Value Chain Coordination is essential to building resilient and equitable local and regional food systems. VCC practitioners are shifting power to foster interdependence, transparency, and community agency. The skills and activities of VCC are critical but not automatic. Though the work of value chain coordination has been taking place for centuries, efforts to understand and build the diverse skills, strategies, and impacts of VCC are relatively recent. We created this course to help strengthen knowledge, connection and skills for those of you building these systems in your communities.

# Meet Your Trainers



Sarah Rucker, PhD  
*SRC Consulting*

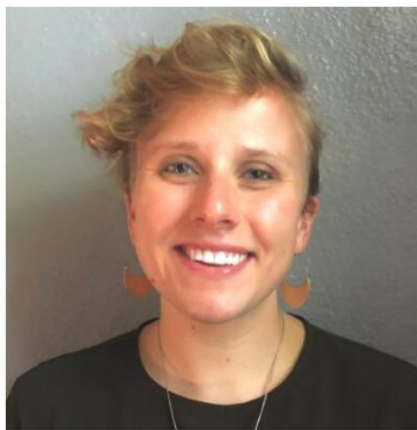


Elliott Smith  
*Kitchen Sync Strategies*

# Meet Your Course Organizers



Ellie Bomstein



Elizabeth Atwell



Andrew Carberry



# We believe:

As individuals, as trainers, and as VCC practitioners:

1. Identities influence, but don't determine
2. Everyone in this room has wisdom to share, and we invite it
3. Power is real, and we are working to be aware of it and use it with intention
4. Beyond the many identities that we all carry, there is a deeper truth: we all **belong** to each other and to the earth

# Training Agenda

## Lessons:

1. History of Value Chain  
Coordination
2. Roles of VCC
3. Focus Strategies and Networks
4. Visualizing Value Chains
5. Evaluating VCC

## Key Topics:

- History of Value Chain  
Coordination Concept
- Differences between Supply Chain  
and Value Chain Strategies
- Opportunities for Shifting Power  
with VCC
- VCC as Systems Work

# After this training you will be able to...

- 1. Take steps to strategically build niche meat value chains in your region**
- 2. Identify opportunities to build capacity to those in your value chain who are currently underserved**
- 3. Begin building partnerships that support a resilient food economy with connected meat producers, processors, support organizations, and buyers**



# Personal Reflection (2 min)

What is your personal purpose for doing food systems work? What's your 'why'?

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Lesson 1:

History of Value Chains

Value Chain –  
set of  
interrelated  
processes which  
create additional  
\$ value along  
each step

(Porter, 1985)

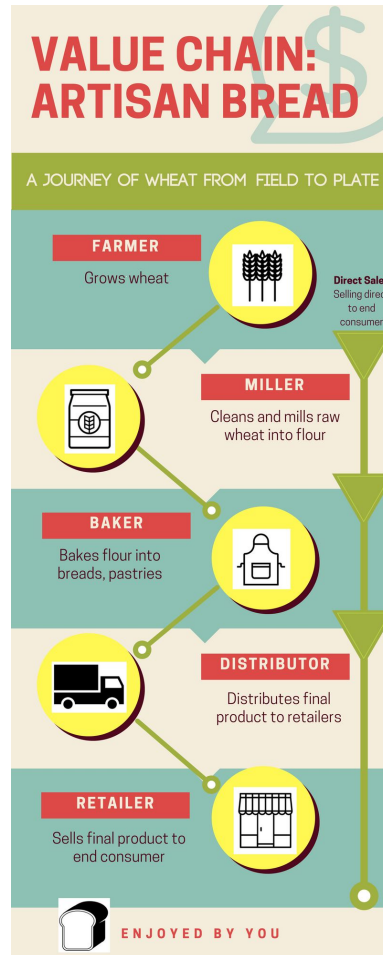


Activities can be  
vertically integrated  
under one business  
to create more  
value

*Goal: competitive advantage over other businesses*

# “Mid-Scale” Food Value Chain

(Stevenson et al. 2011)



Businesses work together to increase value for themselves and each other

Success through cooperation and co-opetition

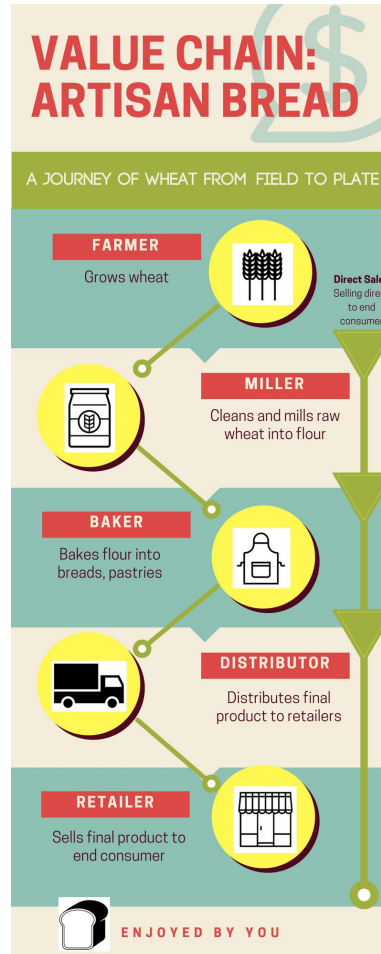
(Bengtsson and Kock, 2000)

“Rising Tides Lift All Ships”

-- JFK

# “Values-Based” Chains

(Stevenson and Pirog, 2008, 2011; Feenstra et al., 2011; Lev et al. 2015)



Strategic Business alliances that move niche products

Guided by shared social, cultural or quality values

*Local*

*Organic*

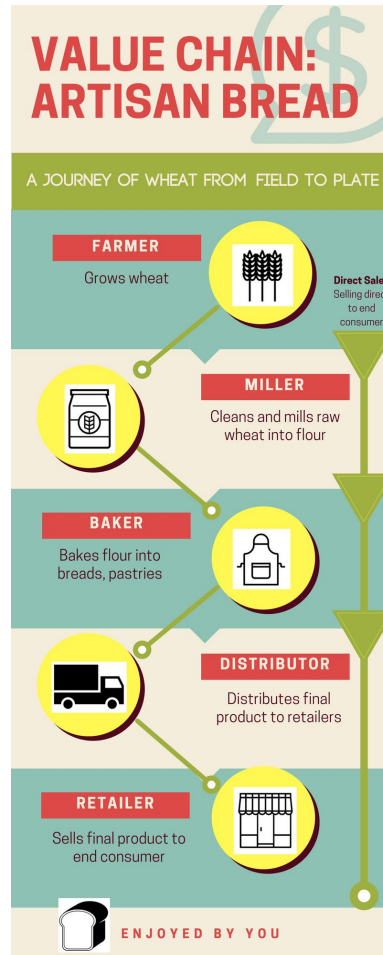
*Equitable*

*Heritage*

*Fair*

# “Values-Based” Chains

(Stevenson and Pirog, 2008,  
2011; Feenstra et al., 2011; Lev  
et al. 2015)



In a values-based model, business actors share:

- Transparency of information
- Risk
- Profits

# Value Chains help specialized, niche producers

Strategic partnerships that move **differentiated product** through non-commodity market channels

- Partner alliances recognize that maximum value for products depends on **interdependence, collaboration, and mutual support**
- Alliances form around **shared values** such as social or environmental concerns that are reflected in the product and customer relation
- Responsive to demand for products differentiated by **values-related** claims such as “local,” “regional,” or “organic”

## ***Value Chain Coordination (VCC)***

A set of roles and activities that foster linkages to knowledge, skills, resources and relationships, which create added value to individuals, businesses, chains and broader regional economies and communities in which these activities take place.



# Why Value Chains over Supply Chains?

Because they are built on **trusting relationships**, they are much more **resilient** in the face of shocks

Covid-19 research showed that **bigger wasn't always better** and that localized networks were **more responsive**, at **quickly and creatively addressing disruptions** in community supply chains.



# Value Chain Strategy Requires Shifting Power

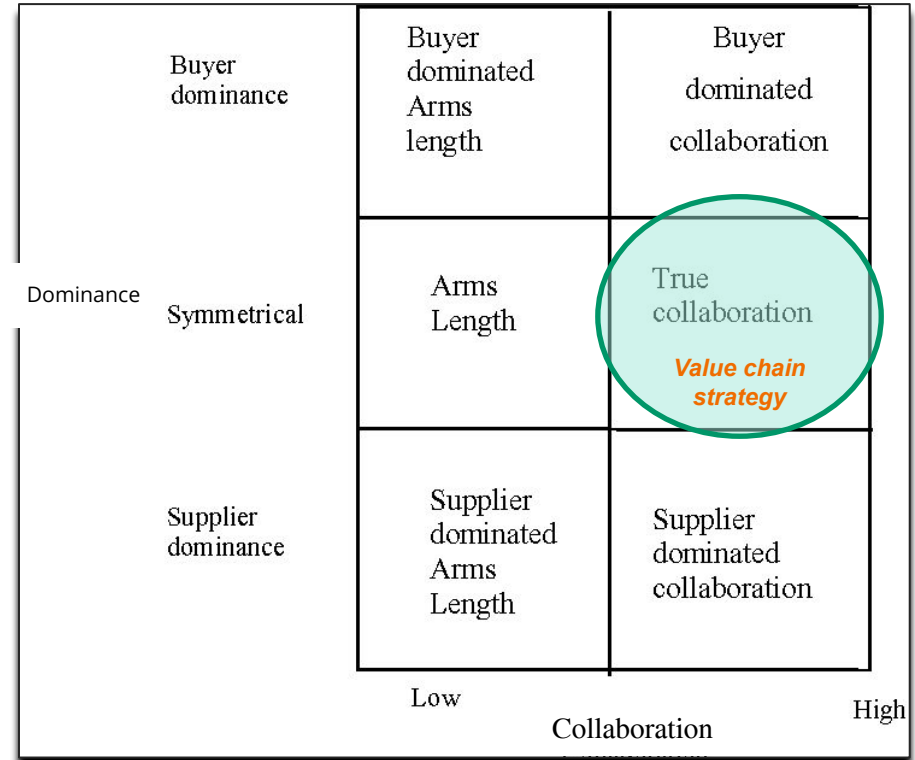
- Value chain strategy is a response to 'traditional' supply chain strategy, *winner-take-all* thinking
- Relationships of all parties (businesses and individuals) must be valued
- VCC thinking strives to bring equitable distribution of **information, risks and profits** across the actors in the chain

Dominance	Buyer dominance	Buyer dominated Arms length	Buyer dominated collaboration
	Symmetrical	Arms Length	True collaboration
	Supplier dominance	Supplier dominated Arms Length	Supplier dominated collaboration
		Low	High
		Collaboration	



# Value Chain Strategy Requires Shifting Power

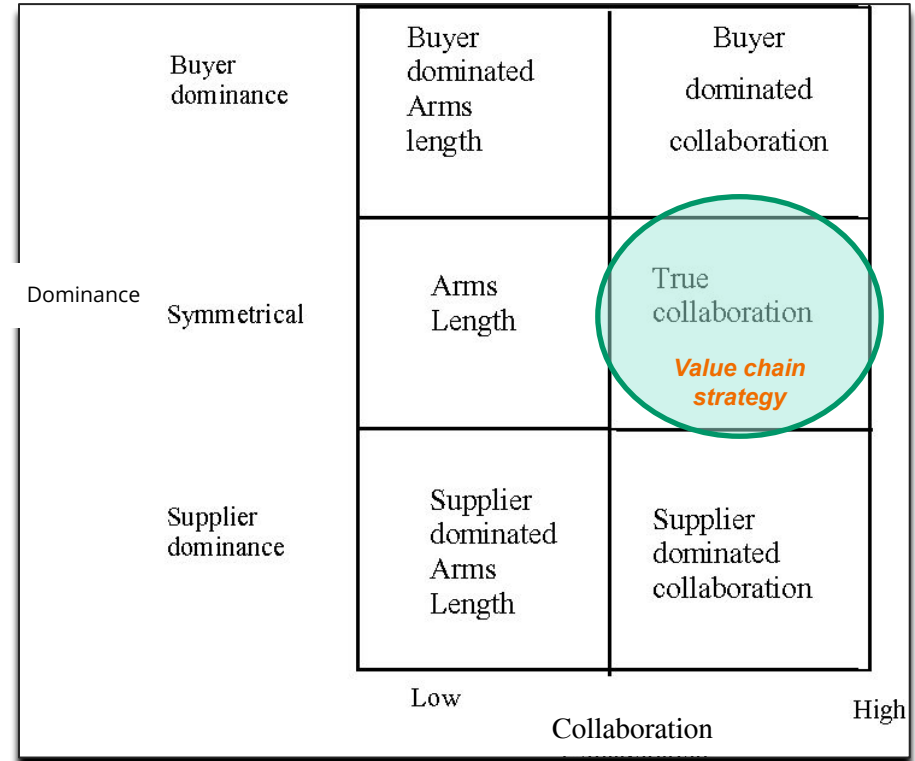
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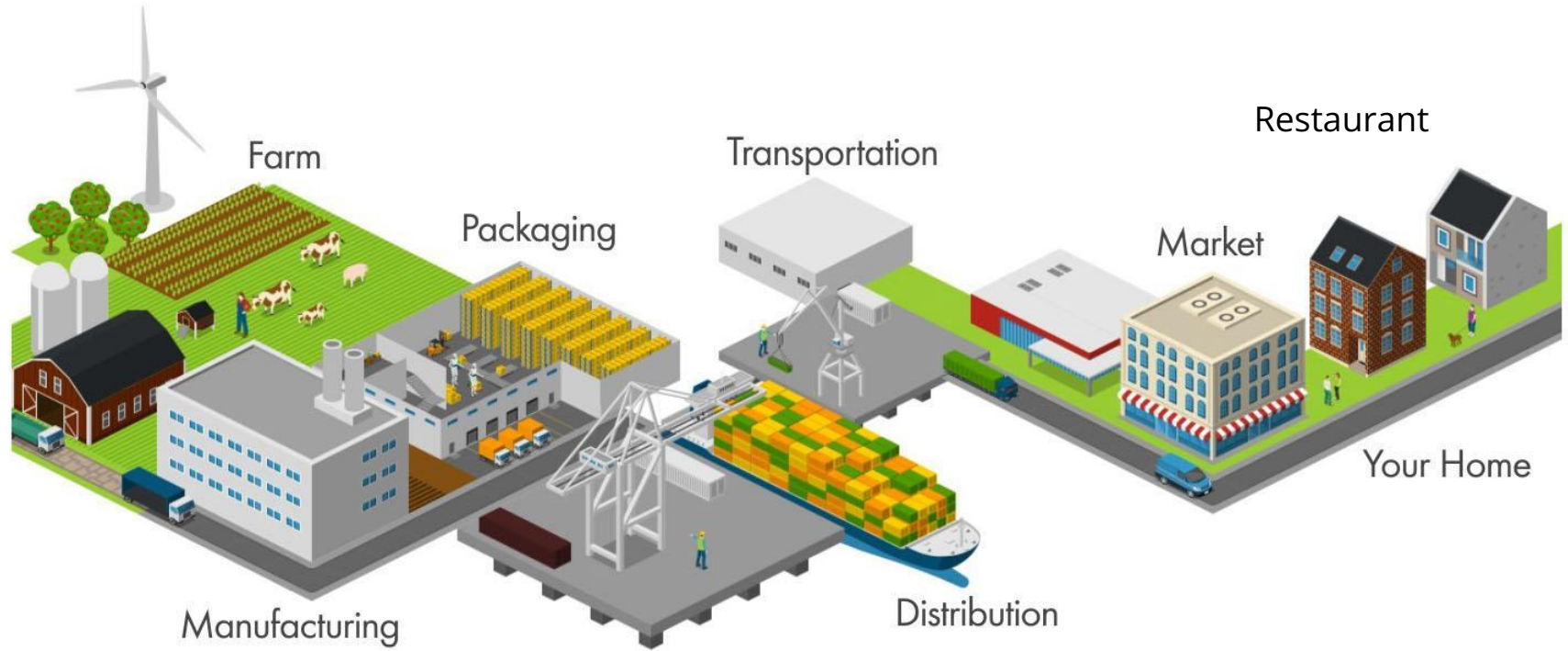


# Value Chain Strategy Requires Shifting Power

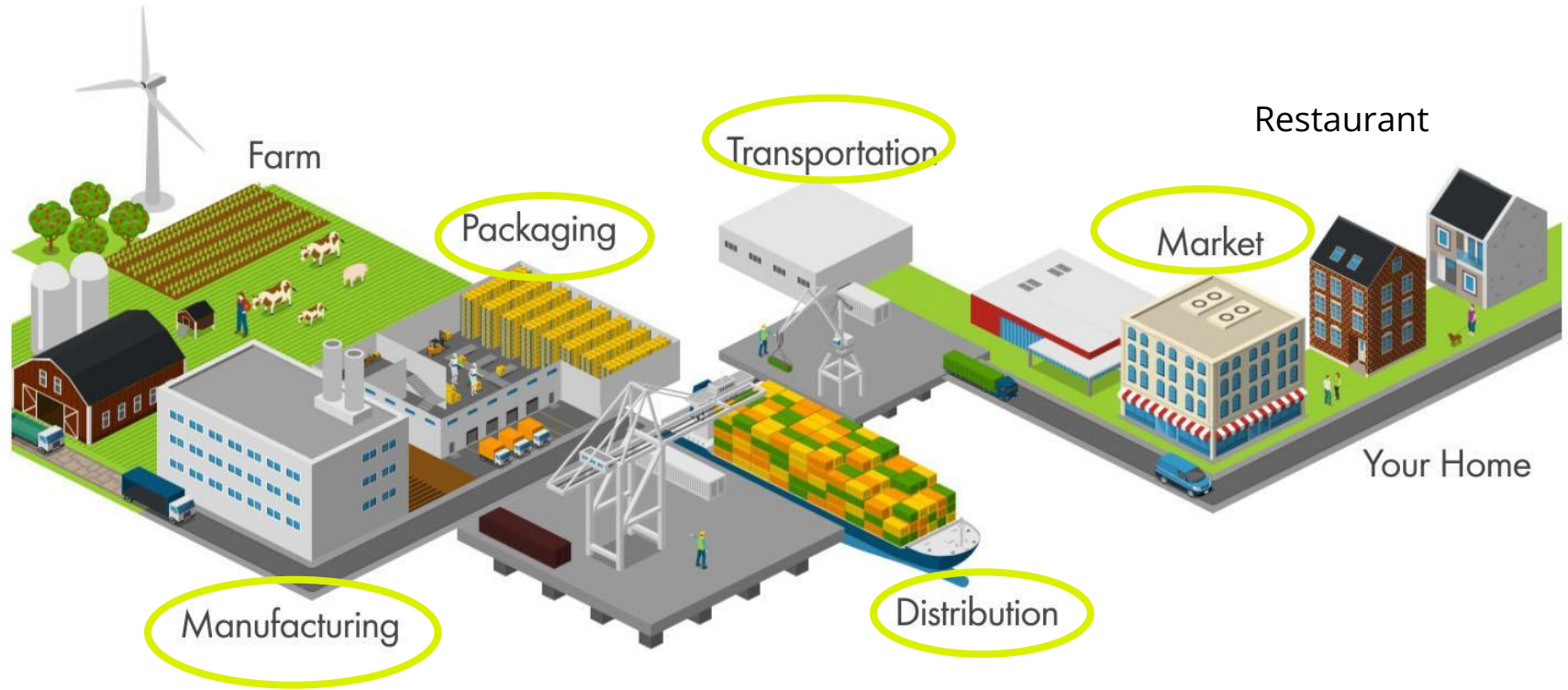
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- Relationships of all parties (businesses and individuals) must be valued
- VCC thinking strives to bring equitable distribution of **information, risks and profits** across the actors in the chain
- **This requires shifting power to those isolated from it**



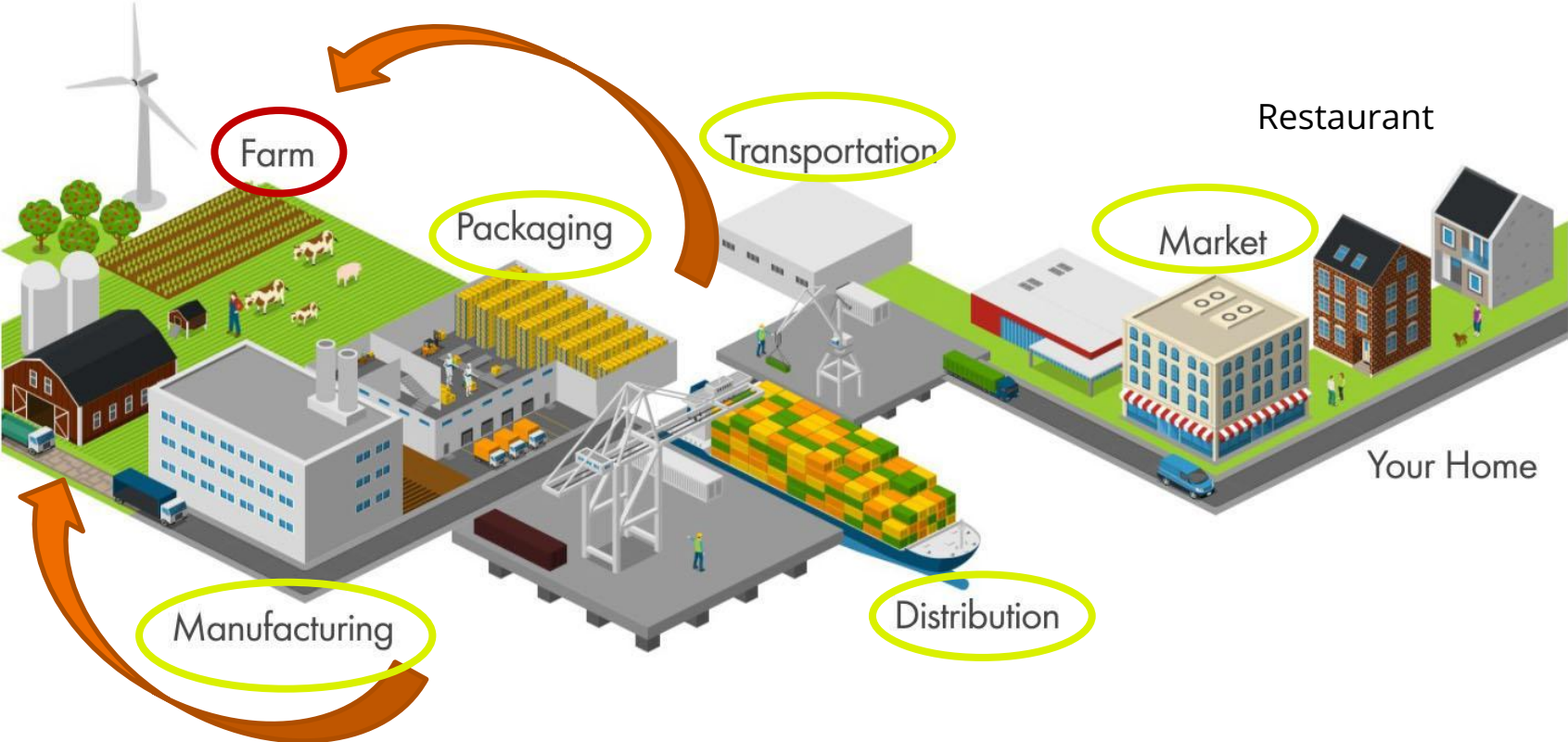
# Power Concentration in Traditional Supply Chain



# Power Concentration in Traditional Supply Chain

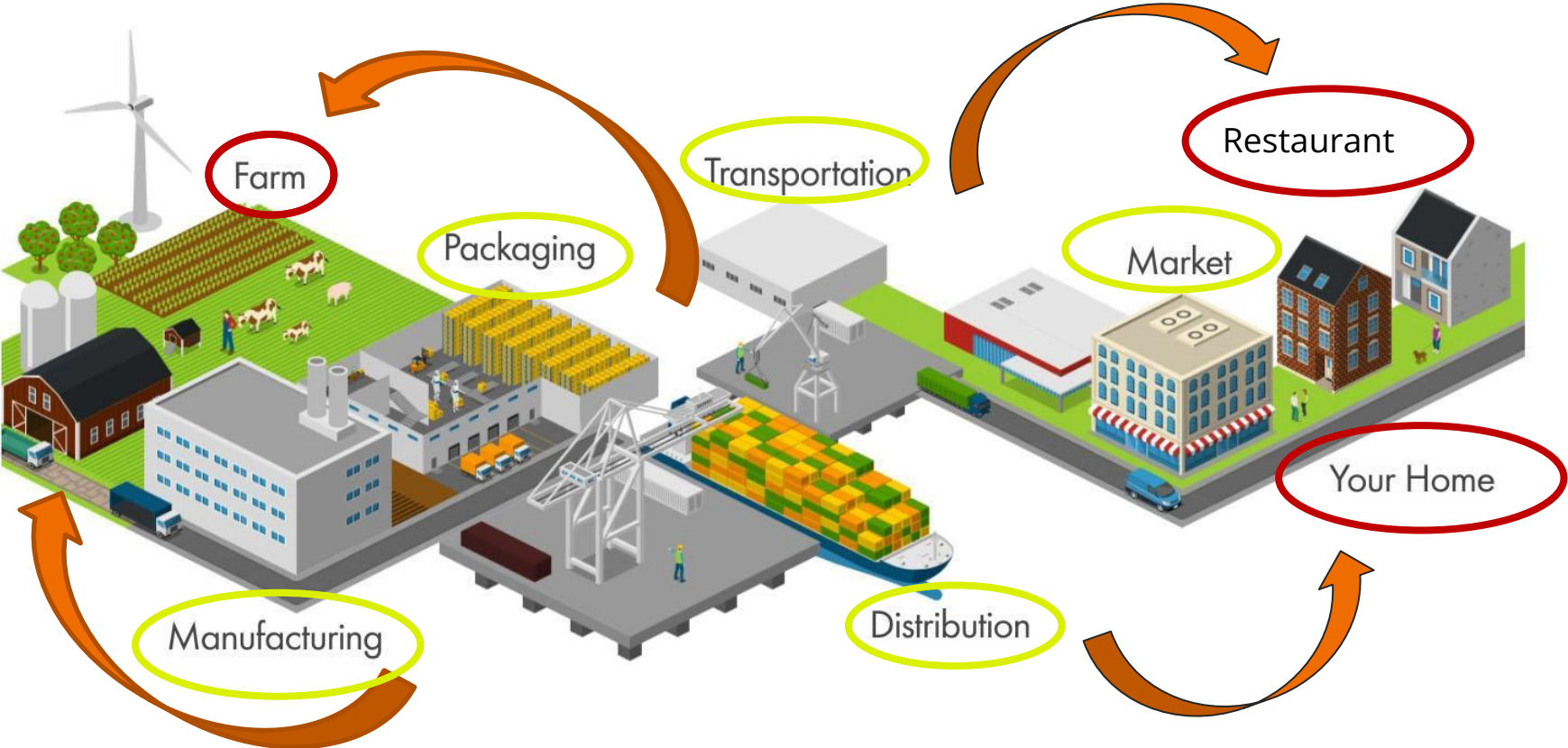


# Redistribution of Power in Value Chain Strategy



Source: P. Kiger, Accessed: <https://money.howstuffworks.com/food-supply-chain-pandemic.htm>

# Redistribution of Power in Value Chain Strategy

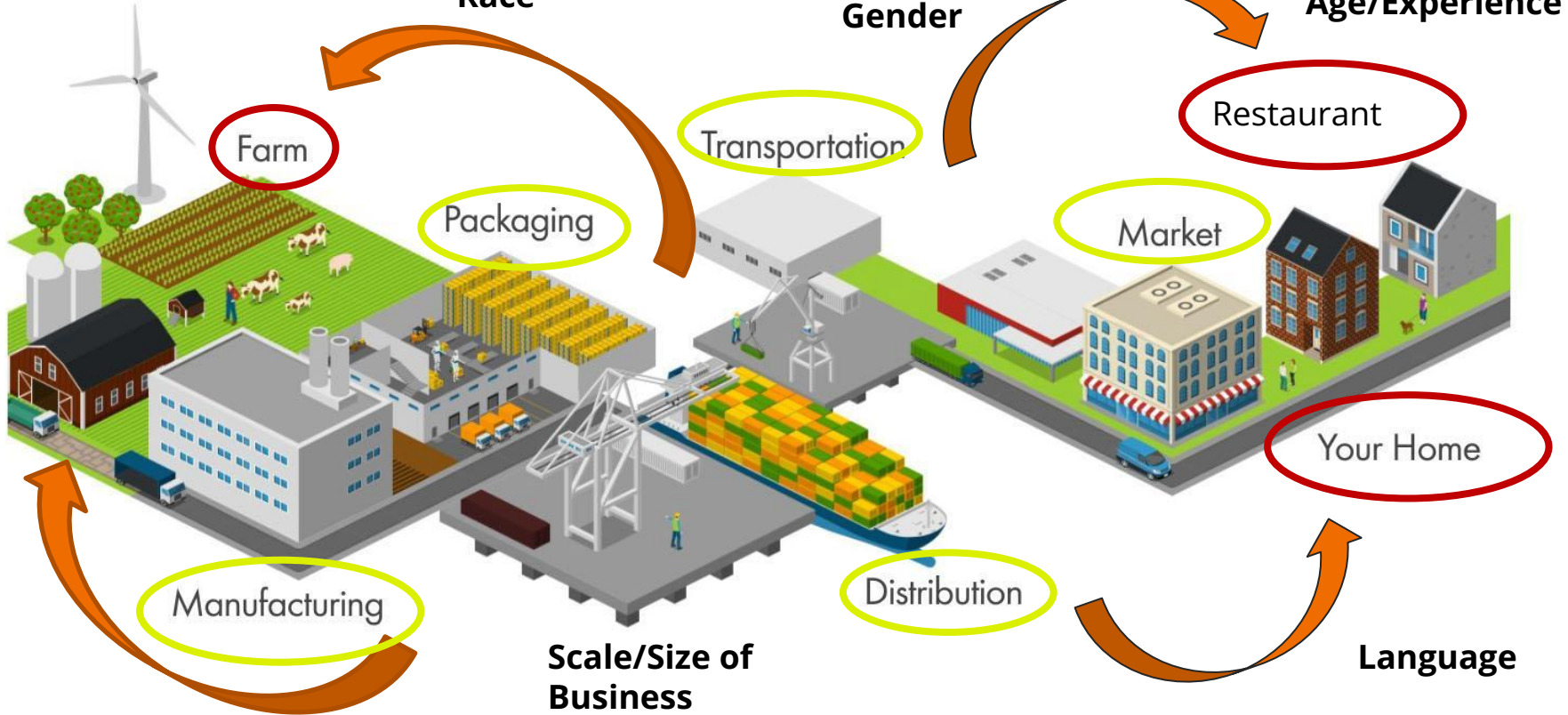


Source: P. Kiger, Accessed: <https://money.howstuffworks.com/food-supply-chain-pandemic.htm>



# Redistribution of Power in Value Chain Strategy

Urban/Rural



# Reflection Activity



## Group Reflection

1. Based on your coordination role, who might you be working with that is currently underserved in your food system?
  2. What challenges does your value chain face in redistributing power in the food system more equitably?
-

Lesson 2:

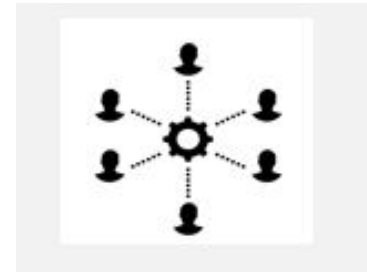
Roles of Value Chain Coordination

# Hard and Soft Infrastructure in Food Systems Development

Hard infrastructure such as **aggregation, processing, distribution facilities** are important, but not the only resources needed to build local economies



Soft infrastructure in the form of **relationships, knowledge and networks**, is a necessary key for efficient use of hard infrastructure



*Barham et al., 2015. "Talk is Cheap ... and Efficient! Facilitating value chain development without costly new infrastructure". National Good Food Network. Webinar.*

**Soft Infrastructure** - a scaffolding of **relationships, trust, knowledge and norms** that support and enable the capacity of individuals and groups within a connected network



(Rocker, 2019)

# Who is coordinated?

*Actors who support the development of individuals, businesses and chains*

## SUPPORT ACTORS

Non-profits



Extension



Local Government



*Actors who are involved in buying/selling transactions*

## TRANSACTIONAL ACTORS

Input Supply →



PRODUCER



PROCESSOR



DISTRIBUTOR



BUYER/RETAILER

→ Consumers

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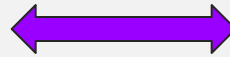


DISTRIBUTOR



BUYER/RETAILER

→ Consumers



*Linkages along the chain*



# Who is coordinated?

*Actors who support the development of individuals, businesses and chains*

SUPPORT ACTORS

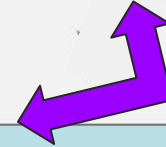
Non-profits

Extension

Local Government



*Linkages from the chains to support actors*



*Actors who are involved in buying/selling transactions*

TRANSACTIONAL ACTORS

Input Supply →



PRODUCER



PROCESSOR

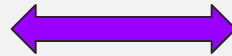


DISTRIBUTOR



BUYER/RETAILER

→ Consumers



*Linkages along the chain*

# Who Coordinates?

Actors who support the development of individuals, businesses and chains

## SUPPORT ACTORS

Non-profits



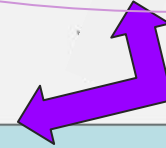
Extension



Local Government



Linkages from the chains to support actors



Actors who are involved in buying/selling transactions

## TRANSACTIONAL ACTORS

Input Supply →



PRODUCER



PROCESSOR



DISTRIBUTOR



BUYER/RETAILER

→ Consumers



Linkages along the chain



# Roles of Value Chain Coordination

## Primary Roles



Market Matchmaking



Providing Technical Assistance



Convening Stakeholders



Innovating and Catalyzing New Ideas

## Systems Enabling Roles



Resource Prospecting



Policy Advocacy



Research, Assessment and Education



Fostering and Maintaining Relationships



Facilitating Accountability and Negotiation

*(Rocker, 2019)*



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*(Rocker, 2019)*



# Roles of Value Chain Coordination



Market Matchmaking

E.g. Connecting a farmer to a local food hub, connecting a food hub to a school district food service buyer



Convening Stakeholders

E.g. Organizing a meeting, event or conference, such as a local buying fair, or a meeting between potential buyers and sellers



Innovating and Catalyzing New Ideas

E.g. A new seasonal processed food product, an all local salad bar, a new event at the cafeteria featuring local food



Providing Technical Assistance

Eg. Providing technical support, such as helping a producer find the right size packaging or processing specifications that meets the needs of the cafeteria



# Roles of Value Chain Coordination



Fostering and  
Maintaining  
Relationships

Following up with people that you meet or match, and continuing to check in at regular intervals about what they need



Facilitating  
Accountability and  
Negotiation

Sometimes a verbal “yes” takes a long time to be put into writing, Following up and checking in on what parties need to formalize agreements for the longer term



Policy Advocacy

Sometimes outdated rules and policies can be hindrances to progress. Identifying policy barriers - and advocating for changes can be critical for supporting new VCC business agreements



Research,  
Assessment and  
Education

Analysis of sales, consumer eating preferences, broader health or economic trends can be useful for assessing need, planning, and motivating stakeholders to take action!



Resource  
Prospecting

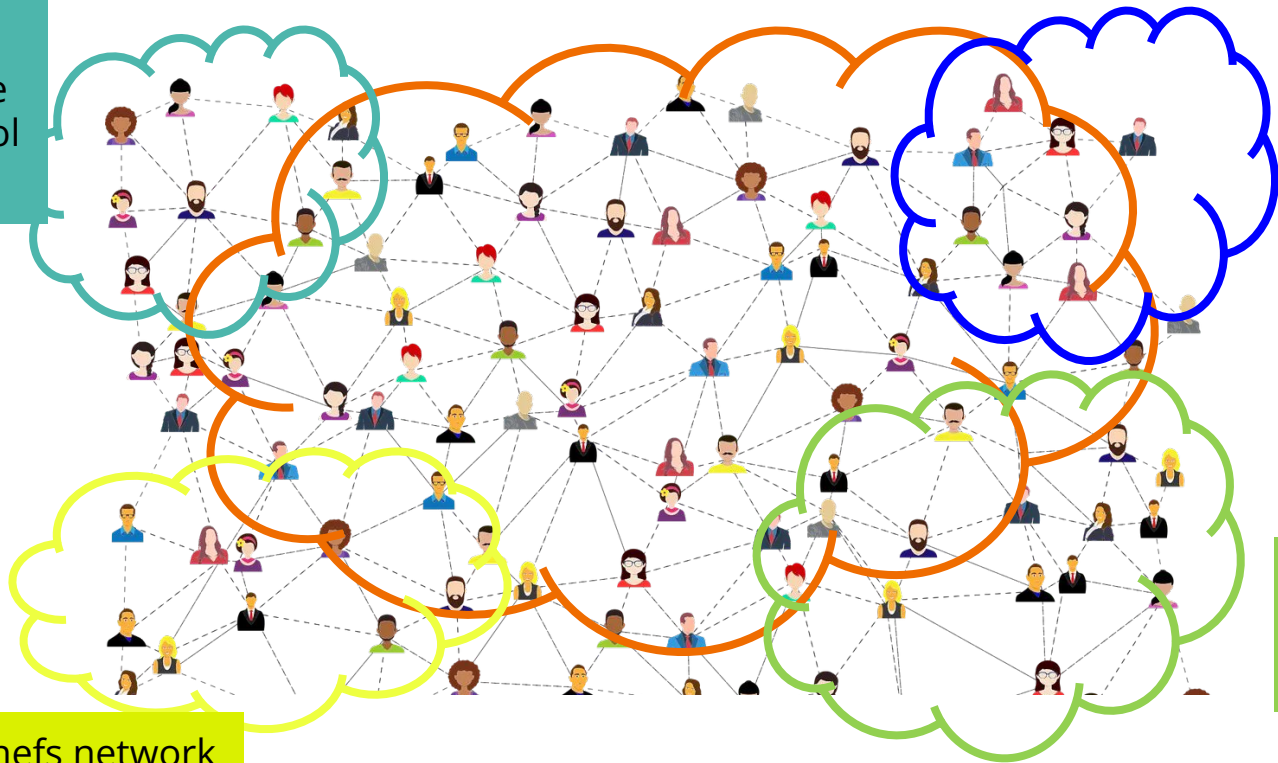
Grants are often a way to catalyze something new. Grant writing and assisting in loan procurement can be an essential asset to help businesses or organizational initiatives grow a new innovation.





Producer co-op who sells to the K-12 school district

Completed a Food Safety Training together



Local chefs network who buying local for their restaurants

Wrote a grant to build a new food hub



# Takeaways for VCC roles

1. **No single super hero performs all roles**
2. A healthy system **has access to all of the roles**, shared among coordinators
3. Identify **which roles are your strengths and communicate your niche**



Lesson 3:

# Developing Networks and Partnerships in VCC

Developing a VCC Network

# Single Coordinator Model of VCC

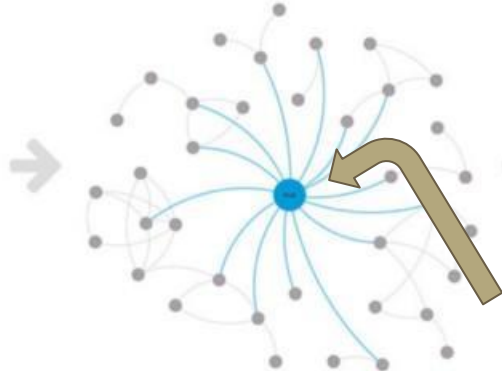
Food System

1. Scattered fragments



Food System

2. Hub and spoke



Single "value chain coordinator"

# Single Coordinator Model of VCC

Food System

1. Scattered fragments

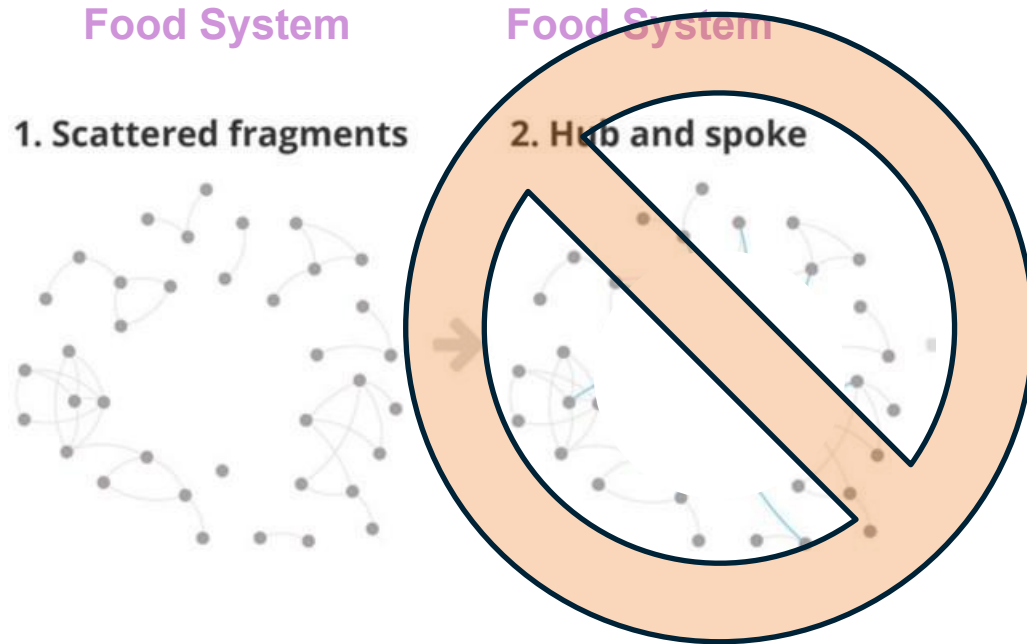


Food System

2. Hub and spoke



# Single Coordinator Model of VCC



**Single Coordinator:  
not a resilient  
model in the  
long term**

# 4 Phases of Network Development

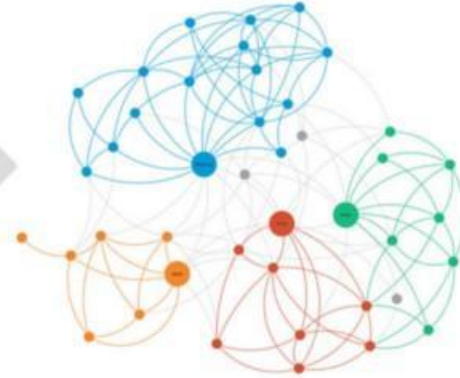
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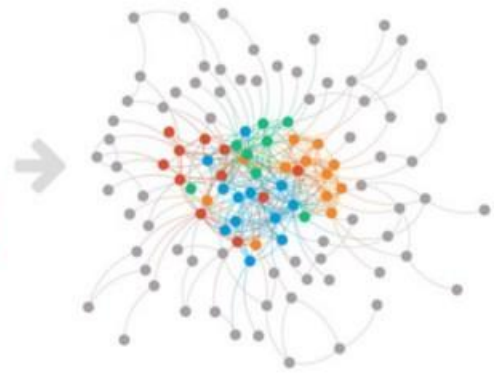
2. Hub and spoke



3. Multi-hub



4. Core/periphery



# 4 Phases of Network Development

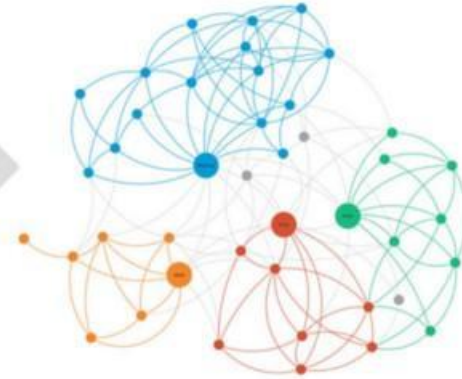
1. Scattered fragments



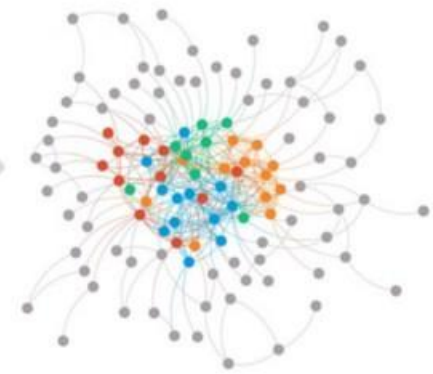
2. Hub and spoke



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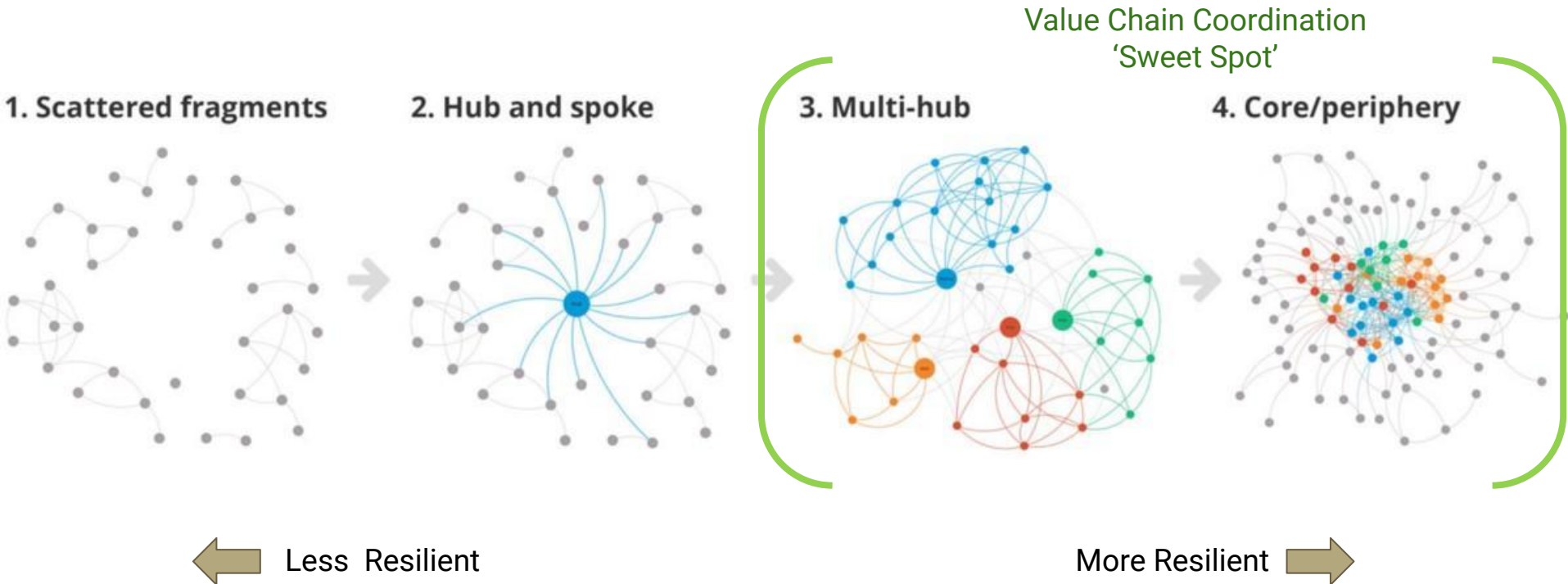
4. Core/periphery



← Less Resilient

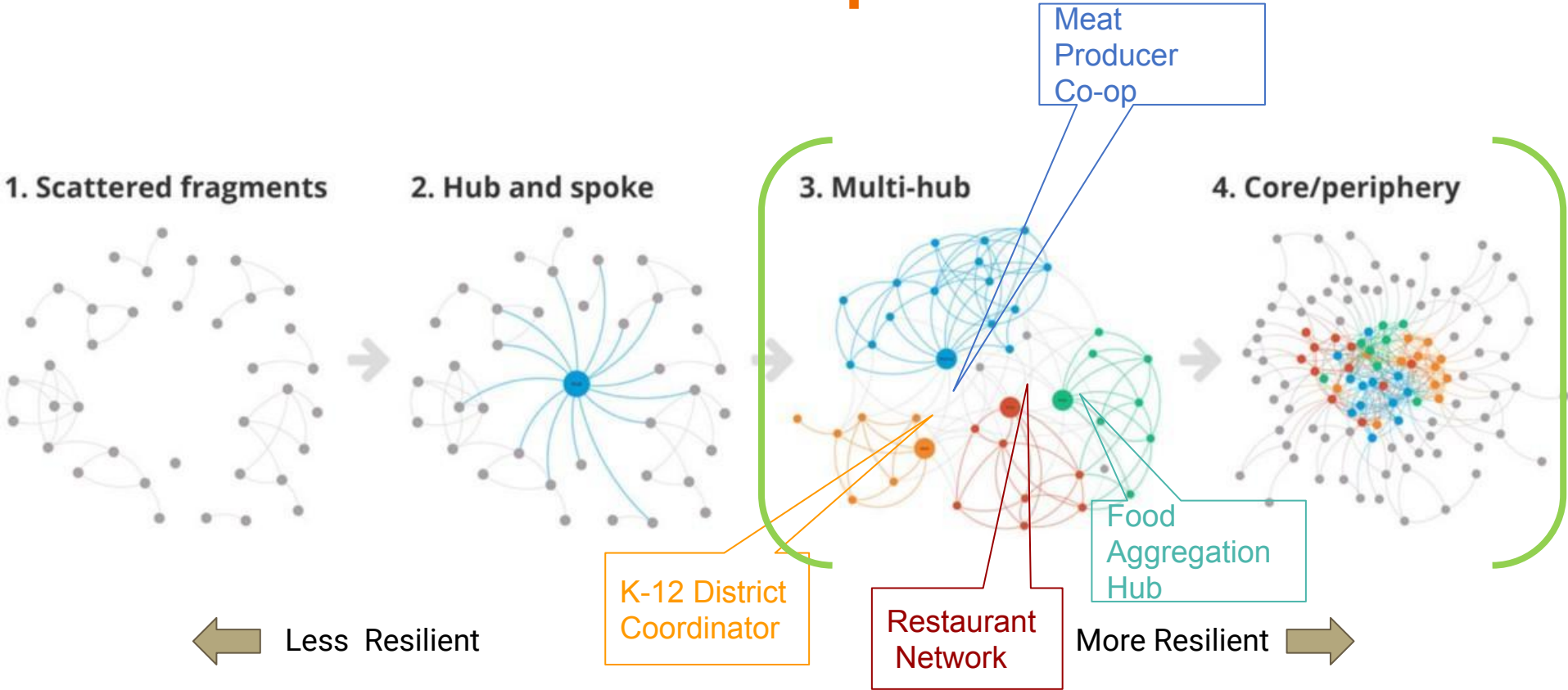
More Resilient →

# 4 Phases of Network Development

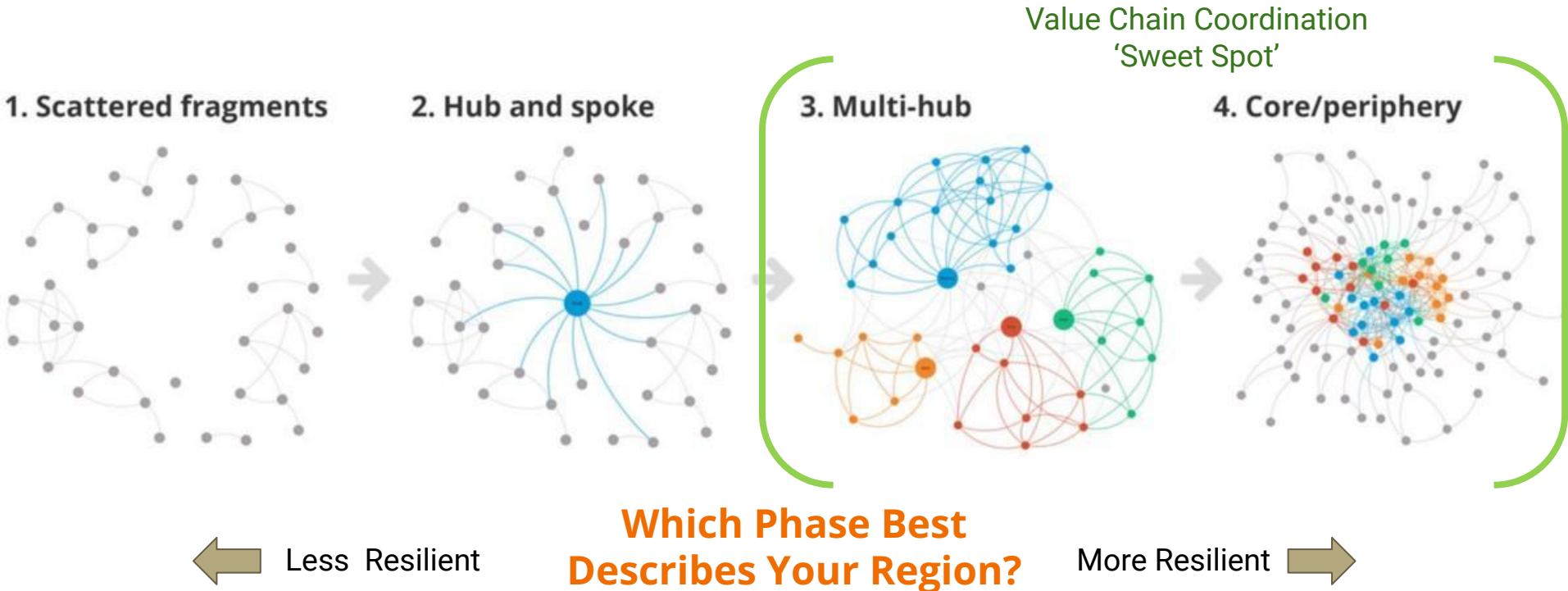




# 4 Phases of Network Development



# 4 Phases of Network Development



# Activity

## Discussion Questions

1. Which phase best describes your region?
  2. Who else is coordination sub-networks in your region that you are currently partnering with, or could partner with in the future?
-

# Lesson 3:

## Developing Networks and Partnerships in VCC

Focus strategies that guide VCC work

# How do you build networks in VCC?



# How do you build networks in VCC?

Identify **Focus Strategies** that guide and bound the scope of your VCC work

## Focus Strategies:

- Product Focus
  - Market Focus
  - Geographic Focus
  - Values Focus
- 





# Why talk about strategies?

- Focus strategies help articulate the boundaries / scope of your work
- You can focus on more than one strategy at a time, and prioritize them differently as needed as your efforts change
- Naming your focus strategies enables you to make partnerships with those doing complementary work in different segments of the food system -- (*building a **multi-coordination hub model** across the food system*)

# Product Focus



Produce



Meat



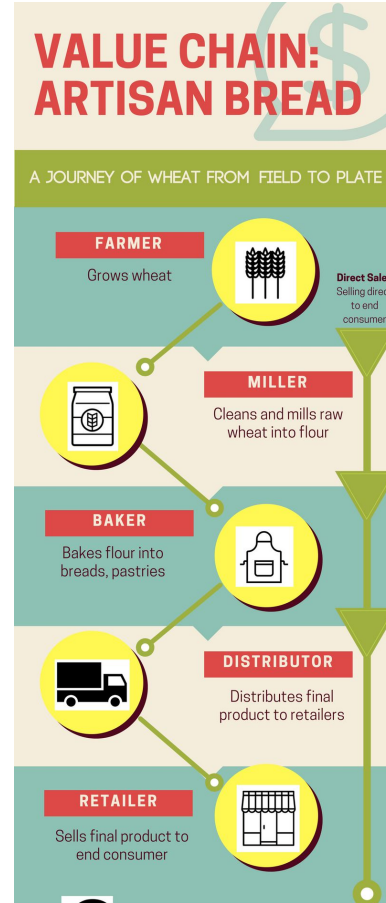
Dairy



Hemp



Small Grains





# Product Focus



Produce



Meat



Dairy



Hemp



Small Grains

## VALUE CHAIN: ARTISAN BREAD

A JOURNEY OF WHEAT FROM FIELD TO PLATE

### FARMER

Grows wheat



Direct Sales  
Selling direct  
to end  
consumer

### MILLER

Cleans and mills raw  
wheat into flour



### BAKER

Bakes flour into  
breads, pastries



### DISTRIBUTOR

Distributes final  
product to retailers



### RETAILER

Sells final product to  
end consumer



## VALUE CHAIN: CRAFT WHISKEY

A JOURNEY OF RYE FROM FIELD TO GLASS

### FARMER

Grows Rye



Direct Sales  
Sells direct  
to end consumer

### MALTSTER

Rye is modified by  
germination into malt



### DISTILLER

Malted grain and/or  
raw grain + enzymes  
are distilled into  
Whiskey



### DISTRIBUTOR

Distributes final  
product to retailers



### RETAILER

Sells final product to  
end consumer



# Product Focus



Produce



Meat



Dairy



Hemp



Small Grains

## VALUE CHAIN: CRAFT BEER

A JOURNEY OF BARLEY FROM FIELD TO GLASS

### FARMER

Grows barley



Direct Sales  
Selling direct  
to end  
consumer



### MALTSTER

Raw barley is modified  
by germination into  
malt



### BREWER

Malt, hops and other  
grains brewed into  
beer



### DISTRIBUTOR

Distributes final  
product to retailers



### RETAILER

Sells final product to  
end consumer

## VALUE CHAIN: ARTISAN BREAD

A JOURNEY OF WHEAT FROM FIELD TO PLATE

### FARMER

Grows wheat



Direct Sales  
Selling direct  
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### MILLER

Cleans and mills raw  
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## VALUE CHAIN: CRAFT WHISKEY

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end consumer

# Market Channel Focus



K-12, Colleges,  
Universities,  
Hospitals



Restaurant,  
Grocery Stores



Farmer Markets, CSAs,  
Direct to Consumer



Photo credit: pew.org

# Geographic Focus



City



County



State



Multi-State  
Region

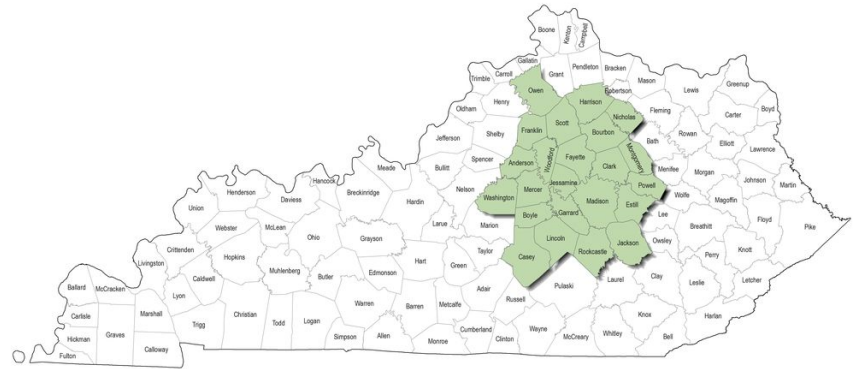


Photo Credit: Bluegrass Farm to Table

# Value Focus



Local



Fair



Equitable



Sustainable



Organic



Photo Credit: Nicholas Johnson, Resourceful Communities



# Focus Strategies:

- Reflect the **stakeholders** you primarily work with (e.g. which segment of the food system)
- May be influenced by **internal** (e.g. organizational mission) or **external sources** (e.g. funders)
- Are useful to communicate the **scope** of your work and find **strategic** partners

**Focus strategies will help you to identify aligned partners for coordination to meet your VCC goals!**

# Takeaways for Network Building in VCC

1. **No single super hero performs all roles**
2. A healthy system **has access to all of the roles**, shared among coordinators
3. Identify **which roles are your strengths and communicate your niche**
4. Identify who performs similar roles and **make a coordinated plan to share the work.**
5. Identify **gaps in roles** and work to connect the dots to those who can perform what you don't already have.

**Build your network around shared roles and your food system will thrive!**

# Exercise: Identifying Coordinating Partners

1

## My Food System:

- **Geography:** Statewide
- **Product Focus:** Pastured Pork
- **Market Channels:** Direct to Consumer and School Districts
- **Values:** Support small scale operations, humane, regenerative practices, assisting new and beginning producers and processors



# Exercise: Identifying Coordinating Partners

2

## My Food System:

- **Geography:** Statewide
- **Product Focus:** Pastured Pork
- **Market Channels:** Direct to Consumer and School Districts
- **Values:** Support small scale operations, humane, regenerative practices, assisting new and beginning producers and processors

Market Matchmaker

Local Food Hub

TA Provider

Extension

Convening Stakeholders

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Resource Prospector

State Department of Agriculture

Innovating New Ideas

Restaurant Network, Entrepreneur Hub

Fostering Relationships

Annual Farmer Network Conference

Accountability Keeper

--

Research & Assessment

Extension, Economic Development Council

Policy Advocate

Food Policy Council

# Exercise: Identifying Coordinating Partners

3

## **Reflect**

1. Which roles are performed?
2. Where are there gaps?
3. Where do I have existing partnerships?
4. Where might new connections need to be formed?

## 1) Specify Focus Areas

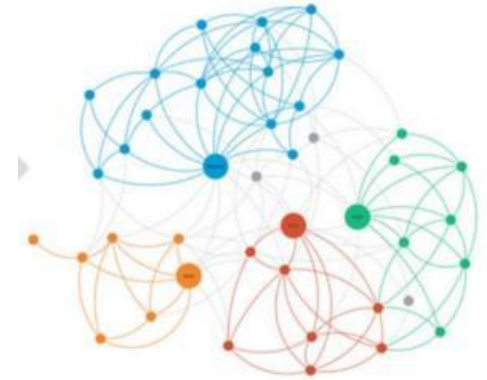
- Product Type
- Market Channel
- Geography
- Values

## 2) Identify Roles



## 3) Identify Partners in Coordination

### 3. Multi-hub



Lesson 4:

# Visualizing Value Chains

Value chain maps and their purpose

**Now... what does  
this all look like?**

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# Visualizing Value Chains

Why and how this helps VCC?

**Value Chain Coordination** is complicated.

Creating a way to **visualize the network** helps people see:

- Who is/isn't connected
- Who has power
- Where opportunities for collaboration exist

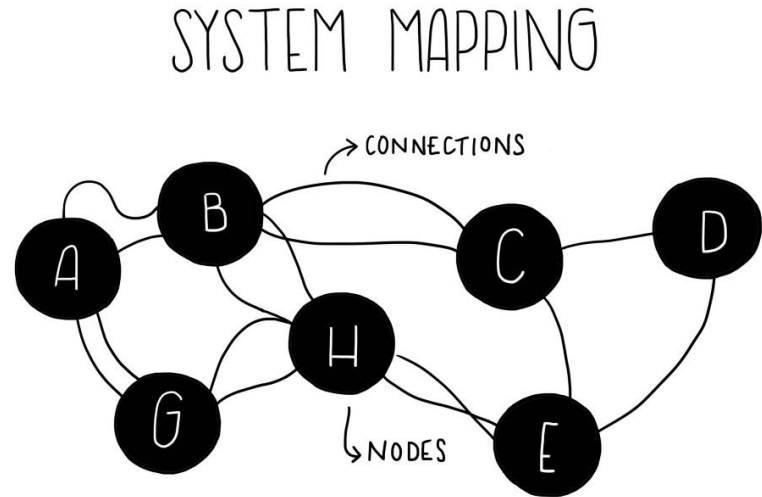


# Value chains are systems, and systems can be mapped

Systems maps are “visual depictions of a system [including] its relationships and feedback loops, actors and trends.”

Takes **complex, interconnected parts** of any system and **simplifies, concretizes, and puts order** to them.

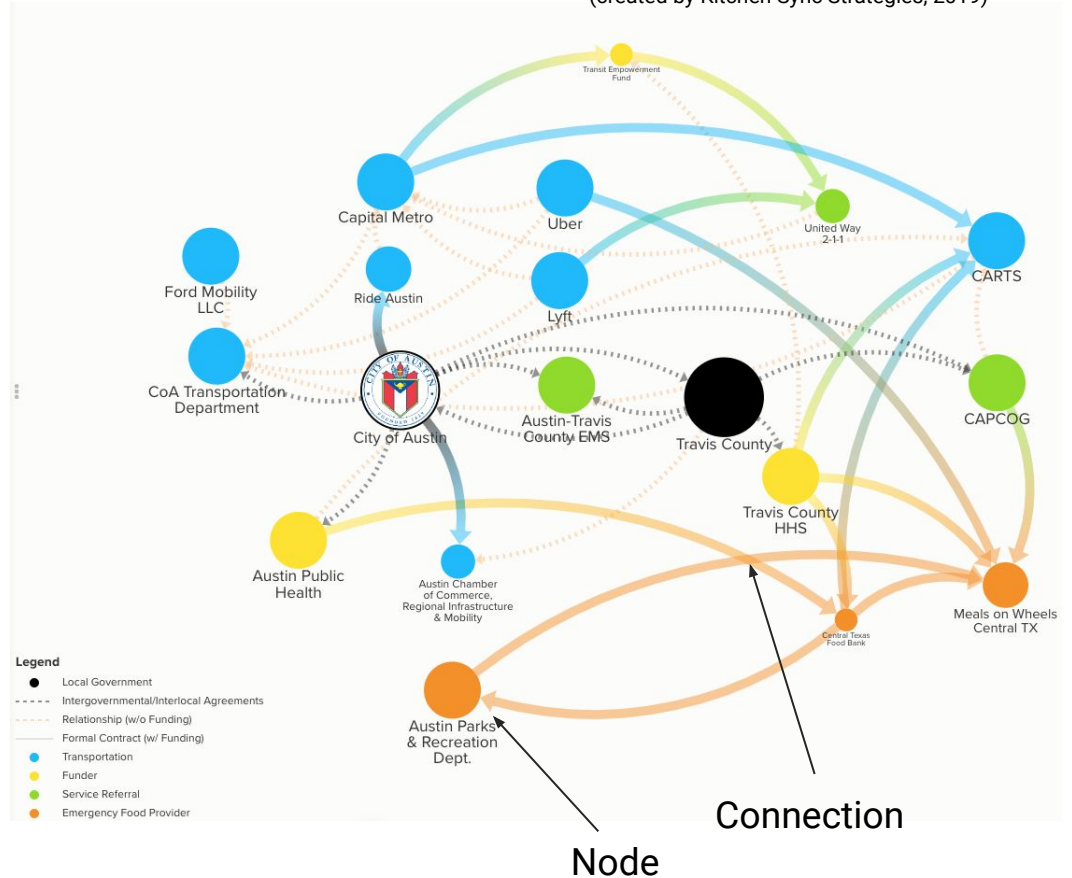
Maps can be as complex as the systems they depict- so start small and go from there.



# A real life systems map (and how it helped)

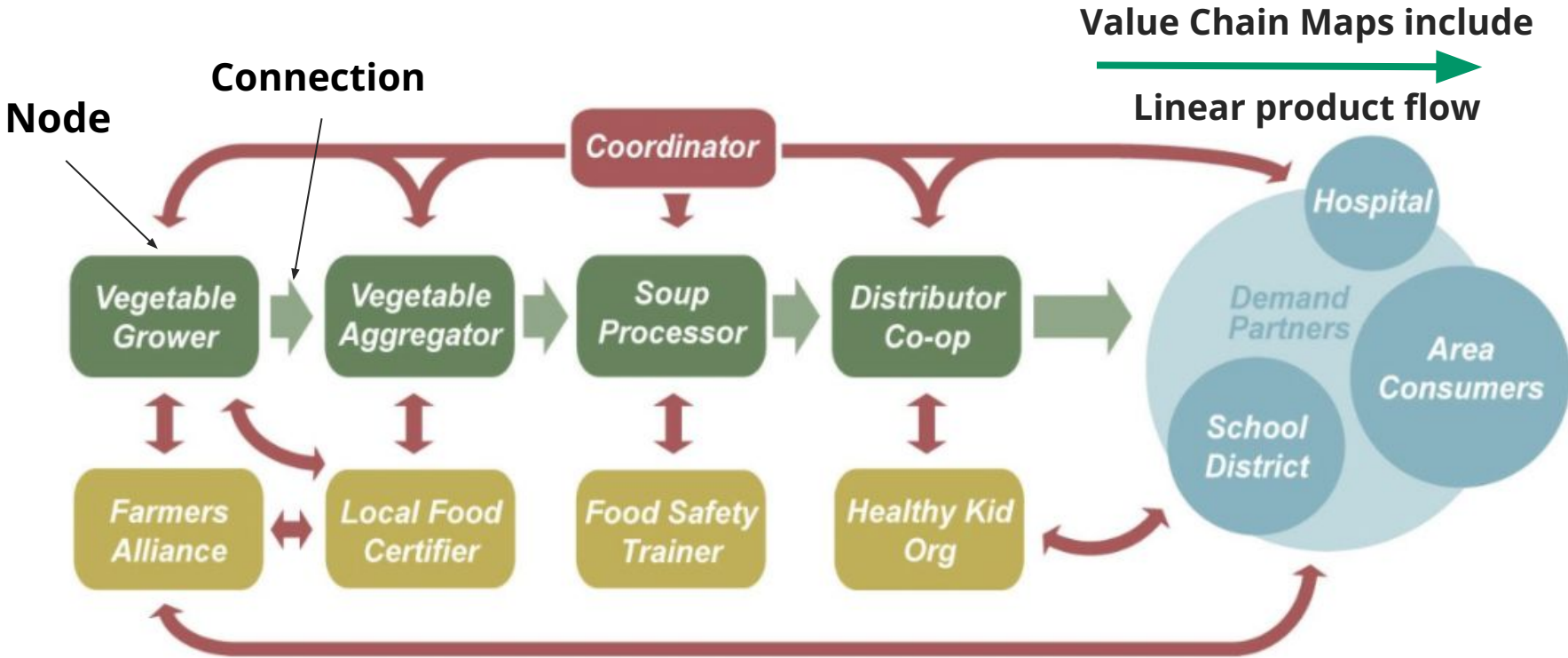
- Created shared understanding between stakeholders from different industries
- Quantified how they were connected (*\$\$ collaboration?*)
- Made explicit what only some recognized: relationships b/w food access orgs and transportation partners were critical

**Transportation + Emergency Food Access in Central TX**  
(created by Kitchen Sync Strategies, 2019)





# Value Chain Maps are a type of systems maps



Example of 'Farm-to-Institution' Value Chain Map from WealthWorks

# Value chains are systems in a specific context

- We are all doing VCC at this moment in our political, social, and cultural context- and our values chains will reflect that
- Value chain maps will reflect their surroundings (and come with all the good, bad, and ugly that entails)
- VCC work requires **seeing, acknowledging, and working through the power imbalances and isolation from power that you encounter**

# Value chains are systems in a specific context

Our food economy is dominated by supply chain tactics that are often predatory and a long, complicated history of racialized capitalism.

VCC work **requires** analyzing who in your value chain has access to resources and the many forms of capital- *and who doesn't*.

Depending on your region or current focus strategy, different dimensions of power will impact who influences access to resources and forms of capital.



Graphic from:  
<https://www.theworldasitcouldbe.org/community-capitals-framework-ccf-for-community-safety-of-humanity-health-connections-with-the-universal-declaration-of-human-rights-udhr/>



VCC practitioners need to understand not just how people are connected, but **how power influences those connections, people, processes, and programs**

# Why this can be useful for VCC professionals

It helps **visually represent who is included** in current coordination efforts (*while showing gaps of who is not*)

It's a powerful tool for strategic planning- especially determining **opportunities for market matchmaking and TA**

Align your day-to-day efforts with your **guiding strategies and values (and your 'why')**

It can help **accelerate your network development**



# Value Chain Map Exercise

# Network Profile

**Geographic Focus:**  
Multi-State

**Market Channel Focus:**  
Farm to School

**Values Focus:** Small-Mid Scale Producers, Mostly Organic

**Product Focus:** Mixed

## Legend

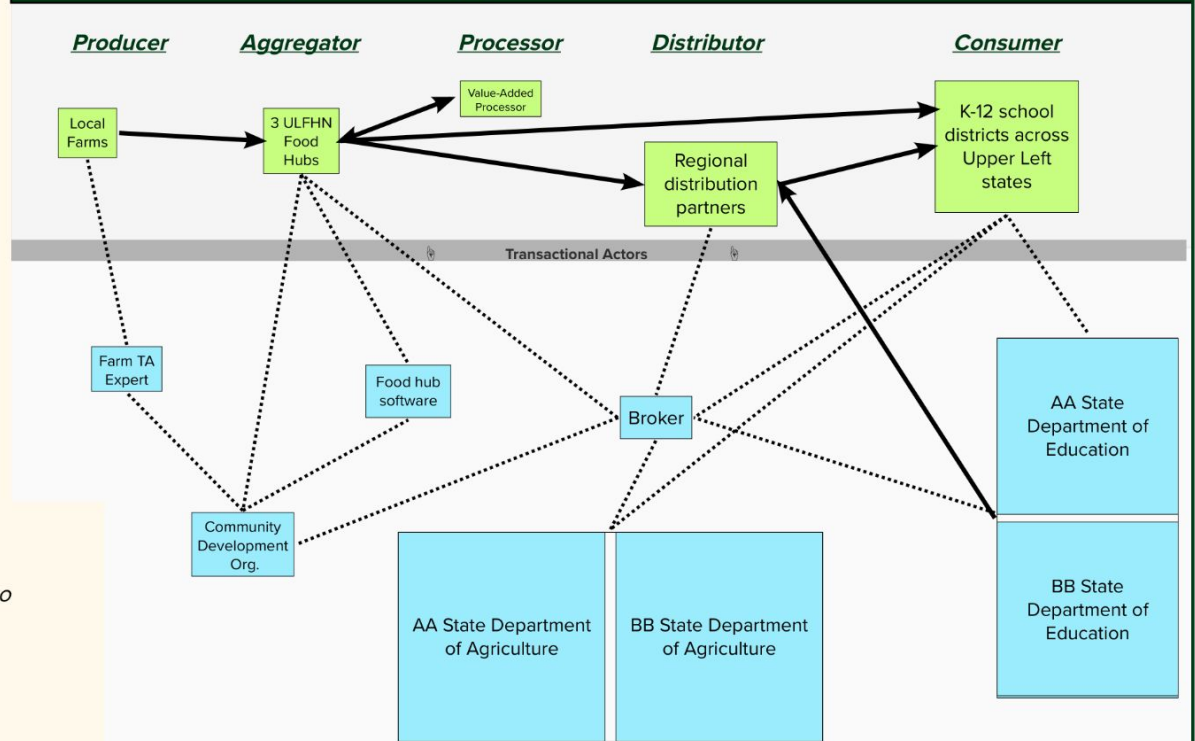
Bigger = more access to financial capital

Support Actors  
 Transactional Actors

Support relationship  
*"We work with each other, but don't buy from each other"*

Transactional relationship  
*"We sell and/or buy products from each other"*

# Visualizing the Upper Left Food Hub Network



# Lesson 5: Evaluating Value Chains

Part 1: Why and how do we evaluate?



**Why do we  
evaluate?**

# Evaluation starts with the big picture

- What are the **values** that guide our work?
  - Example from FSLN: Leadership in every seat, we can do more together than we can alone, respect for lived experience of communities working to build a more equitable food system
- What is the **impact** you want to have through this work, and how were community members involved in determining that?
  - Example from FSLN: By 2025, 5,000 food systems leaders will have more resources, relationships, and power to realize equitable food systems that generates good food, health, and opportunity for all.

# Focusing in on goals and roles

- What are our short and long term goals to fulfill those values (VCC Roles) (**outcomes**)?
  - *More and stronger relationships among food systems leaders, Greater systems leadership capacity, seeding action and collaboration*
- Which activities should we focus on to carry out those strategies (**outputs**)?
  - *integrate peer-peer networking time into trainings, provide trainings with a systems framing, provide grants to fund collaborative work*

# Observed Trends in VCC Evaluation

Transactional Actors: Typically measure things



Support Actors: Typically measure relationships



# Transactional and Support Actors

*Actors who support the development of individuals, businesses and chains*

## SUPPORT ACTORS

Non-profits



Extension



Local Government



## TRANSACTIONAL ACTORS

*Actors who are involved in buying/selling transactions*

Input Supply →



PRODUCER



PROCESSOR



DISTRIBUTOR



BUYER/RETAILER

→ Consumers

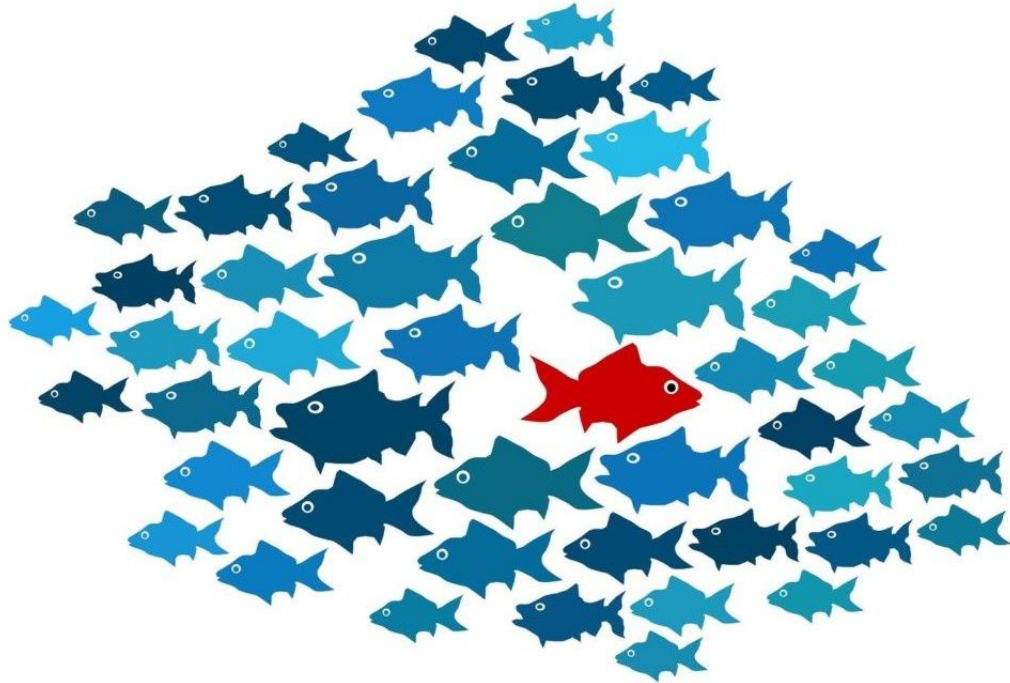
# Common Metrics for Transactional Actors

- **Gross Sales**
- **New Jobs**
- **Acreage**
- **Customers/Households Served**
- **New Products to Market**
- **New Innovations in Product, Processes, etc.**
- **New Partnerships among Value Chain Actors**
- **Meetings with Buyers (talking about products, values)**
- **New Customers**
- **Customer Satisfaction and Retention**
- **Chain Efficiencies (e.g. Waste mitigation)**

# Common Metrics for Support Actors

- Hosting meetings, trainings (e.g. one-on-one, multistakeholder)
- Attendance at meetings/convenings
- Types of relationships created
- Number of individuals, organizations, businesses engaged
- Social Network Analysis
- Increased capacities from Technical Assistance
- Grant funding received /leveraged
- Partnerships formalized
- Indirect Sales
- New Product Innovations
- Customers Served

# New Innovations in Evaluation





# Share and Tell:

## How are you currently evaluating your work?

1. What **metrics and methods** are using to currently evaluate your VCC work?
2. What is the **biggest conundrum** you are currently experiencing with evaluating your work?
3. What **evaluation methods or tools** are you currently using that you are most excited about?

# Share and Tell: Metrics and Methods

## **“Quantitative metrics”**

### **“Funder required metrics”**

- individuals reached/informed, farmers supported,
- Number of buyers and vendors, sales numbers, sales markets (i.e. restaurant, farmers market, etc).
- Dollars invested into local food, pounds of food distributed, # of boxes distributed, # of partners participating, # of households served, type of producers
- number of workshop attendees

### **“Qualitative feedback”**

- “provides information that is more "useable" and makes it easier to tell the stories of our food ecosystem, which in turn drives sales and awareness.”
- demographics, location & practices/products

# Share and Tell:

## Evaluation Challenges

- “Collecting and measuring impacts from other sectors (e.g. public health)”
- “Collecting data feels challenging when we’re not directly involved with the buying/selling of product,”
- “Finding funding and staff to conduct evaluation and studies analyzing data”
- “Innovating new metrics not historically utilized / recognized”

# Share and Tell:

## Tools That Work!

- “A GIS map of food banks, hubs, distributors, farmers markets, processors, SNAP vendors, Double Up Food Bucks vendors”
- “VCC Tracker introduced to the IN Value Chain Network for our funding partner reporting! And adding the required USDA numbers to the form”
- “Surveys, publicly accessible data from the USDA”
- “Salesforce for outreach tracking -- provides the ability to visually see outreach progress over time and very customizable. Like most systems, only as good as the utilization and inputs”
- <https://templatelab.com/value-chain-analysis>

# Reflection

In your current  
evaluation  
process...

What's working?  
What's not?

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# Section 2: Dimensions of Evaluation

# Dimensions of Evaluating Value Chain Coordination

- Organization Type
  - Transactional or Support Actor
- Level of Impact in the Food System
  - Individual, Business, Chain, Network/System/Community/Economy
- Impact over Time
  - Short, Medium, Long Term
- Representing Power
  - Determining whose measurement methods to use
- Evaluation as a Reciprocal Process
  - Diligently representing stakeholder values and voices in evaluation process

# Levels of VCC Impact

System or Community



Value Chain



Business



Individual





# Impacts over Time

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**Short Term** - impacts realized in days, weeks, or months

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**Medium Term** - impacts realized several months to a year

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**Long Term** - impacts realized 2 or more years later

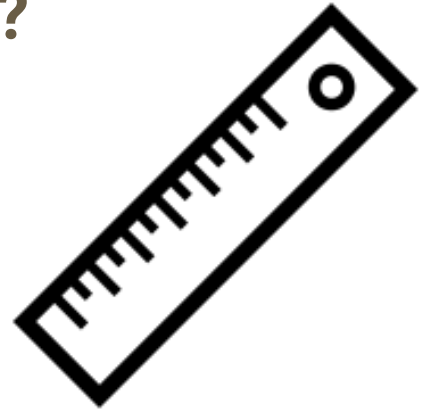
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# Recognizing Power Dynamics in Evaluation

## **Who determines *what* matters to measure?**

- The people you are trying to serve?
- Community members?
- Funders?
- Planners or Policy Makers?
- Researchers?



# Evaluation process matters as much as content

## Extractive vs. Reciprocal Evaluation

- Whose data are you broadcasting?
  - What is being taken?
  - What is being shared back?
  - Who *belongs* in the messages you're delivering?
  - Who benefits from the outcomes?



# Evaluation process matters as much as content

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***Evaluation should be in service to the stakeholders you represent***

# Reciprocal Evaluation Processes are....

- Inclusive
- Iterative
- Acknowledge complexity
- Reflect the values of the stakeholders being served in the work - not just funders, academic institutions, etc.
- Elevate values and voices of the communities where the work is taking place

# Reflection

1. Reflect on your current evaluation strategy, what dimensions have you considered?

- *Levels of Impact*
- *Short, Medium, Long Term Impacts*
- *Whose measurements are you using?*
- *Is your evaluation in service to the population that you represent?*

2. What is an area you would like to improve?

---

Lesson 5:

# Evaluating Value Chains

Part 2: Developing your evaluation plan

# Evaluation plan terminology

**Values:** The guiding principles for which you stand; the ideals you refuse to compromise as you conduct your work.

**Impact:** Progress toward your long-term goals. (Ex. Increased number of BIPOC owned food businesses, wealth created by BIPOC farms and businesses, improved population health, reduced GHG emissions).

**Outcomes:** Effects of outputs on the overall network and it's beneficiaries or partners. (Ex. business transactions resulting from introductions, attendees that applied lessons from a training to their organization).

**Outputs:** Counts from activities. (Ex. Number of introductions made, number of attendees at a training).

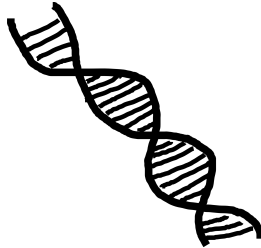
**Metrics:** What you measure (Ex. how you capture impact, outcome, output)

References: [Stanford Social Innovation Review](#), [Analytics in Action](#), [Donorbox](#)

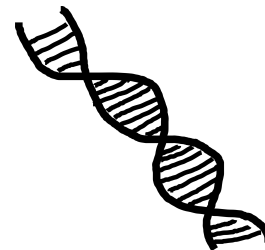


# The link between evaluation and strategy

- Evaluation planning follows the same path as strategic planning, building from foundational values to specific actions.
- Evaluation provides feedback on which strategies are most effective
- Results should be integrated into strategic planning to refine and make adjustments to VCC activities.

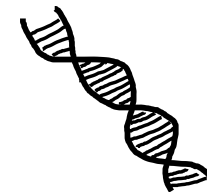


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# How do you capture all of that?

- Of the many things you could measure, which are most important?
- Narrowing metrics by considering:
  - What you want to say about your work?
  - What data you would like to share with: Those you serve, partners, funders
  - Which roles are most important to achieving your vision?
  - Which are most feasible to collect?
- **Takeaway:** Pick your top 3 most important roles, pick an output and outcome related to each; then see what you could say about your work with that data.

# VCC Evaluation Guide and Template

- For Value Chain Professionals in both transactional and support roles to help you:
  - Align your evaluation systems with your values
  - Focus and clarify how to evaluate value chain coordination
  - Effectively document the impact of your work.
- Includes a guide to walk you through this process in 6 steps
- Template with sample metrics and evaluation dashboards
- Developed by the Wallace Center over the past two years with input from many partners.



Value Chain Coordination: Evaluation Guide

# Acknowledgements

The following individuals contributed to this guide and the evaluation template by sharing valuable feedback. This work could not have been done without the input of this group!

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- Sarah Elliott, Artisan Grain Collaborative
- Sarah Rocker, USDA National Institute of Food and Agriculture
- Shanna Ratner, Yellow Wood Associates, Inc

# Roles of Value Chain Coordination

## Primary Roles

Primary roles focus on developing capacity and market opportunities for transactional business actors along the chain



Market Matchmaking



Providing Technical Assistance



Convening Stakeholders



Innovating and Catalyzing New Ideas

## Enabling Roles

Enabling roles help support broader environments for markets and chains to develop, sustain and thrive



Resource Prospecting



Policy Advocacy



Research, Assessment and Education



Fostering and Maintaining Relationships



Facilitating Accountability and Negotiation

# How to use the guide

- Guide includes prompts and space for notes, starting with your 'why' or values, and ending with metrics.
- Recommend working with a team
- Steps:
  - 1. Listing your values
  - 2. Defining community
  - 3. Linking values to strategy
  - 4. Identifying your roles
  - 5. Considering your levels of impact
  - 6. Completing your evaluation plan





# Step 1: Listing your values

## Step 1: Listing Your Values

Your values are your North Star, or the guiding principles that shape how you conduct your work. Ultimately, your evaluation results should reflect your core values. Before you start to build out your evaluation plan, take time to write out...

The values that guide my work are...

Is racial equity reflected in these values? Why or why not?

# Step 2: Defining Community

## Step 2: Defining community

We use the word “community” throughout this guide, defined as the people you are accountable to and the intended beneficiaries of your work. Taking time to define what “community” means to you will help you throughout this process.

**Describe the community you serve and are accountable to. Does this include farmers or consumers?  
What is the racial and socioeconomic makeup of the community?**

# Step 3: Linking Values to Strategy

Flowing from the values listed above, what is the ultimate impact you want to have through your VCC work in 5-10 years? If you were successful, what would the food system in your community look like?

How were community members involved in developing and endorsing this impact statement?  
If community members *were* involved, did you modify what you were doing because of their input?  
If community members *were not* involved, how could you get more community input?

What shorter term (1-2 years) outcomes would help you reach the impact above?

- 1.
- 2.
- 3.

# Step 4: Identifying your primary roles

## Primary VCC Roles

Market Matchmaking	
Our activities/outputs:	
Partners fulfilling this role:	
Providing Technical Assistance	
Our activities/outputs:	
Partners fulfilling this role:	
Convening Stakeholders	
Our activities/outputs:	
Partners fulfilling this role:	
Innovating and Catalyzing New Ideas	
Our activities/outputs:	
Partners fulfilling this role:	

## Step 5: Considering your levels of change

- How does your work ripple over time?
- How are you impacting individuals, organizations, the community, and broader systems?

## Step 6: Completing your evaluation template

- A template VCC practitioners can use to quickly build an evaluation plan based on best practices in the field.
- Developed based on past VCC evaluation projects, and input from project advisors and beta testers.
- Includes a list of VCC-related metrics and templates you can use to complete your own evaluation plan.
- Template is focused on quantitative metrics, storytelling resources also included in the guide

## Step 6: Completing your evaluation template

- **Metrics listing:** 37 metrics based on past evaluation projects and input from Value Chain Coordinators
- **Evaluation dashboard template:** A place to copy metrics from the listing tab to develop your own dashboard
- **Tracking system template:** A worksheet that can be used to capture data from multiple activities related to your metrics, which can then roll up into the dashboard
- **Example evaluation questions:** Example demographic categories and questions that can be used in surveys of activity participants. These are primarily geared toward facilitating VCC Roles

# Reflection

Revisit your “Why”

Are you currently evaluating what you need to in order to know if you’re realizing your vision?

What VCC tools have you learned about that could improve your evaluation process and guide your work?