

**EVALUATING MARKETMAKER:
ANALYZING THE IMPACT OF AN ELECTRONIC FOOD MARKETING NETWORK
AND ITS CAPACITY TO IMPROVE EFFICIENT MARKET ACCESS FOR SMALL TO
MIDSIZED FARMERS AND FOOD ENTREPRENEURS
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Originally, MarketMaker was developed as an online marketing resource to give Illinois farmers greater access to regional markets by linking them with processors, retailers, consumers and other food supply chain participants. Through a multi-state partnership of land grant institutions and state agricultural agencies, MarketMaker houses one of the most extensive collections of searchable food industry related data in the country with over 400,000 profiles of farmers and other food related enterprises from 16 states and the District of Columbia (as of July 2011). Each partner state has its own unique site, but all sites access a common database, allowing users to conduct multi-state searches. The national portal for all state sites is at <http://national.marketmaker.uiuc.edu/index.html> .

As the MarketMaker network grows and develops a historical track record, so does the need to formally track financial, economic, and other impacts on participants and to identify areas that need improvement. The goal of this project was to develop a comprehensive framework and implementation strategy for measuring the impact of the MarketMaker project. Its secondary purpose was to design a short-term feedback mechanism that will guide the future growth and development of the MarketMaker program in a manner consistent with total quality improvement.

FINAL REPORT

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Evaluating MarketMaker: Analyzing the Impact of an Electronic Food Marketing Network and its Capacity to Improve Efficient Market Access for Small to Midsized Farmers and Food Entrepreneurs

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Final Report

I. Introduction and Overview

Previous studies demonstrated that non-commodity value-added products have economically significant markets among key consumer groups such as high income, highly-educated, or ethnic populations. Additionally, these products are more in sync with the demographic shifts among food consumers in the US. A recent study in South Carolina indicates that consumers are willing to pay an average twenty-seven percent more for fruits and vegetables and twenty-three percent more for meat products produced in-state vs. elsewhere.¹

In 2000, the University of Illinois and the Illinois Department of Agriculture initiated a project called MarketMaker in order to create an electronic medium that would be a source of strategic food marketing data and a forum for connecting food supply chain partners for value-added food marketing ventures. MarketMaker has the potential to provide important infrastructure for household and institutional consumers seeking in-state product and for producers to identify and exploit these lucrative markets. It also has the potential to help producers and others in the supply chain to identify these markets and to facilitate necessary communication between producers and consumers as well as all along the supply chain.

MarketMaker was developed as an online marketing resource to give Illinois farmers greater access to regional markets by linking them with processors, retailers, consumers and other food supply chain participants. It is currently one of the most extensive collections of searchable food industry related data engines in the country and contains profiles of farmers and other food related enterprises across seventeen states (Table 1). All the information can be mapped and queried by the user. The site was created by a team of University of Illinois Extension researchers with the intention of building an electronic infrastructure that would easily connect food producing farmers with economically viable new markets and aid in the development of quality driven food supply chains. The original project was funded by the Illinois Council on Food and Agricultural Research (C-FAR) and the Illinois Department of Agriculture. As other states have joined the MarketMaker network, funding has typically come from state

¹ Carpio, Carlos and Olga Isengildina-Massa, "Consumer Willingness to Pay for Locally-Grown Products: The Case of South Carolina", presented at the Southern Agricultural Economics Association annual meetings, 2-6 February 2008.

departments of agriculture and Land Grant University resources. However, significant funding has also come from other sources (e.g. South Carolina Sea Grant Consortium).

Table 1. Number of business profiles listed in MM by state and category, as of May 27,2011a.

State	Type of Business				Total
	Farmers/ Producers	Non-Farm ^b	Farmers Markets	Wineries	
Arkansas	48	136	40	3	227
Colorado	549	1,727	131	85	2492
Florida	164	698	142	17	1021
Georgia	514	234	141	18	907
Iowa	405	560	223	22	1210
Illinois	1084	546	283	63	1976
Indiana	356	175	119	14	664
Kentucky	449	290	173	16	928
Louisiana	180	226	149	4	559
Michigan	378	338	139	46	901
Mississippi	119	86	60	1	266
Nebraska	693	129	80	9	911
New York	1561	582	438	211	2792
Ohio	447	713	192	91	1443
Pennsylvania	171	221	36	8	436
South Carolina	402	270	93	3	768
Washington, DC	10	15	26	0	51
Total	7,530	6,946	2,465	611	17,552

^aBusinesses are not limited to one profile, and therefore may be counted multiple times (once for each profile).

^bThis category includes agritourism, buyers, processors, wholesalers, food retailers and eating and drinking places.

MarketMaker provides information to inform decisions of both producing and consuming users. For producers, it provides information to help them better target consumers and identify potential businesses with which to collaborate. The site allows an individual to select consumer attributes and receive a geo-coded response that shows where consumers with those attributes live. Consumer data related to six different demographic characteristics can be mapped to help locate potential markets. Full census profiles for geographic markets can also be generated.

A second feature on the web site includes business level data that allows the user to identify other potential supply chain partners. Since this data is also geo-coded the user can find those potential business partners that are best situated to serve their intended markets. The mapping feature makes MarketMaker a much more intuitive vehicle for gathering the marketing data necessary to launch a new value-added venture.

For consumers - households, processors, handlers, retail, and wholesale – MarketMaker provides information to inform decisions about where to purchase products or to identify upstream opportunities to add additional value.

Since market systems are rarely defined by state boundaries a logical progression for the state-level project was to expand to other states. In June of 2004 MarketMaker was presented at the National Value Added (Agriculture) Conference generating considerable interest among states in attendance. Iowa and New York stepped up to join Illinois in advancing the concept of a national MarketMaker network. In 2005, a multi-state partnership of Land Grant Institutions and agriculturally focused organizations formed to build a national network of interconnected MarketMaker sites. This network is now composed of seventeen states and is poised to grow further.

In order to better coordinate MarketMaker program growth and development, a national advisory board was formed in January 2007, with representation from the first 6 states in the network, plus an additional four states, one from each geographical region (as defined by CSREES). The Advisory Board meets bi-monthly via conference call, and face-to-face twice annually. The states participating in the MarketMaker Network share ideas and expertise in developing the strategies to grow and improve MarketMaker's capacity as a food marketing resource. The advisory board regularly contributes to the decision making process for growing MarketMaker. Each state creates its own educational outreach program teaching food entrepreneurs how to use the site and the basics of marketing value added food products. This information is shared across states via the MarketMaker Network. In June of 2007 a national portal for all state sites was launched (<http://national.MarketMaker.uiuc.edu>).

The MarketMaker implementation team works to sustain the platform and manage the data base that is the foundation for all the state sites. New technologies and features are incorporated by the team as needs are identified and resources become available. Since MarketMaker sites can host a wealth of educational information beyond the data that is currently the centerpiece of the site, there is an emerging effort to better develop the educational capacity of MarketMaker. The Land Grant Institutions that are currently part of the project bring a powerful reserve of knowledge and expertise in the area of food enterprise development and marketing and MarketMaker is seen as a vehicle for delivery of these resources.

At least nineteen states to date have formally expressed their support and willingness to contribute local resources for the project, and the list is growing. The Iowa MarketMaker site went on-line in January, 2006. Nebraska, Kentucky, New York, Georgia, Mississippi, Michigan, Ohio, Indiana, South Carolina, Washington (DC), Florida, Arkansas, Pennsylvania, and Louisiana, all have subsequently launched MarketMaker state sites. Texas and Alabama are planning to launch this year (2011). Several other states are giving consideration to development of a state site. The current status of these sites is easily viewed on the national MarketMaker website (<http://national.marketmaker.uiuc.edu>).

As the MarketMaker network grows and develops a historical track record so does the need to formally track the financial, economic, and other impacts on participants and to identify areas that need improvement. The formal evaluation process identified in this project is one of the top priorities of the Advisory Board for the foreseeable future. In response, a group of research faculty at Clemson University, in collaboration with the South Carolina Department of Agriculture, sought and received funding from the USDA Federal/State Marketing Improvement grant program (USDA-FSMIP) to develop a comprehensive evaluation framework for this project. The goal of this project was to develop a comprehensive framework and implementation strategy for measuring the impact of the MarketMaker project. Its secondary purpose was to design a short-term feedback mechanism that will guide the future growth and development of the MarketMaker program in a manner consistent with total quality improvement. The objectives were as follows.

- 1) Provide baseline information for a longitudinal study on the long term economic impact of this medium;
- 2) Develop a structure and strategy for the ongoing collection of quantitative evaluative information;
- 3) Develop a well-researched and designed set of easy-to-use evaluation tools for state level MarketMaker program implementations to allow state-to-state comparisons and aggregation to build national level impact assessments;
- 4) Collect qualitative information from current users to complement and inform the quantitative evaluation framework.

Our research protocol consisted of four separate yet inter-related stages. The first stage involved the development of a series of program logic models for various user groups. In the second stage, we developed a comprehensive set of quantifiable evaluation indicators. Third, we conducted a series of focus groups with MM users to gather information regarding their expectations and identify potential barriers to the adoption and use of MM. The final stage combined the results of stages 1, 2 and 3 into a ready to use state level MM evaluation plan to allow comparisons across states and aggregation to build a national level impact assessment.

II. Literature Review

Even though farmers have traditionally lagged behind in terms of Internet access and computer use, their use of these technologies has increased in recent years. In 2009, 59 percent of U.S. farms had Internet access and 64 percent had access to a computer, compared to 29 percent and 47 percent in 1999, respectively (USDA-NASS, 2009). One of the potential applications of computers and the internet in farm business is E-commerce which refers to the use of the Internet to market, buy and sell goods and services, exchange information via internet, and create and maintain web-based relationships between participant entities (Fruhling and Digman, 2000).

E-commerce has been said to have the potential to both increase revenues from sales as well as to significantly decrease costs through greater efficiencies of operation. Gains in efficiency could result from the reduction of inventory levels, transportation costs, information costs, and order and delivery times (Batte and Ernst, 2007; Montealegre et al., 2007). Moreover, the creation of electronic markets that are expected to be more transparent and more perfectly competitive than physical markets, may attract more consumers and thus increase demand and improve the firm's strategic position with customers seeking specific niche products or having geographical restrictions (Batte and Ernst, 2007; Montealegre et al., 2007).

In spite of this touted potential of E-commerce to improve farm businesses, the literature on the economic impact of E-commerce is very limited. Most of the literature related to the use of computers and the Internet has focused on describing and analyzing the extent of adoption and usage (e.g., USDA-NASS, 2009; Batte, 2004).

The USDA has been periodically collecting nationwide data on farm business computer and internet access and use (see Table 2). As the data in Table 2 reveals, the percentage of farms using computers and the internet for business purposes is below the percentage of farms with access to them. For instance, in 2009, even though around 60 percent of farms in the US had access to computers and the internet, only 36 percent used computers for farm business, only 13 percent purchased agricultural inputs over the Internet, and only 11 percent used the Internet to conduct marketing activities (USDA-NASS, 2009).

Differences in adoption rates seem to be correlated with several factors including farm size, farm type (e.g., crops vs. livestock production) and also farm location. Bigger farms have higher rates of adoption and use of computers and the internet for businesses purposes than smaller operations (USDA-NASS, 2009). Although crop and livestock farms have similar rates of access to computers and internet, crop farms have slightly higher rates of use of the technologies in the farm businesses. These relations at the aggregate level are consistent with studies using individual level data. Mishra and Williams (2006) found that regional location and farm size are positively related to Internet adoption.

Table 2. Farm Computer and Internet Access and Their Use by Economic Class¹ and Farm Type, 2005-2009.

ECONOMIC CLASS/ FARM TYPE	FARMS														
	With Computer Access			With Internet Access			Using Computers for Farm Business			Purchasing Agricultural Inputs over Internet ³			Conducting Agricultural Marketing Activities over Internet ⁴		
	2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
PercentPercent								
US ²	59	64	64	51	57	59	32	35	36	9	11	13	9	10	11
1,000-9,999	55	60	60	48	52	56	22	25	25	7	9	10	5	5	6
10,000-99,999	58	64	62	47	55	57	35	36	38	9	11	12	9	10	12
100,000 & over	75	75	76	65	71	70	58	59	61	16	18	20	19	20	25
100,000-249,000	70	68	70	59	63	63	51	51	52	13	15	15	16	16	19
250,000 & over	80	81	81	72	76	76	66	66	69	18	21	24	23	24	31
Crop Farms	60	64	65	52	56	60	34	37	40	9	11	12	9	10	14
Livestock Farms	58	64	63	50	57	58	30	33	33	9	12	13	8	9	10

¹ Economic class refers to sales and government payments received during the previous year.

² Excludes AK and HI.

³ Agricultural inputs include seed, fertilizer, chemicals, veterinarian supplies, feed, machinery, replacement parts, farm supplies, office equipment, etc.

⁴ Agricultural marketing activities include direct sales of commodities, on-line crop and livestock auctions, on-line market advisory services, commodity price tracking, etc.

Source:USDA-NASS, 2009

Some research efforts have also concentrated on specific ways farmers use the internet. The main use of the internet by farmers seems to be related to the exchange of information. Park and Mishra (2003) using the data from the 2000 Agricultural Resource Management Survey (ARMS), found that 83 percent of U.S. farmers use the internet for price tracking, 56 percent use it to access agricultural information services, and other (percentage not reported) use the

Internet to keep records and transmit data to clients. Similarly, Smith et al. (2004), in a study of 517 farmers in the Great Plains states of Kansas, Iowa, Nebraska, and Oklahoma found that most of surveyed farmers used the Internet as a source of information. Specifically, the study report that 62 percent of surveyed farmers use the internet to obtain information on commodity markets, 54 percent use it to gather technical information on inputs, 36 percent to retrieve financial information, 73 percent to collect weather information, and 37 percent to obtain information on agricultural policy.

Use of the internet to buy and sell products appears to be less common. Briggeman and Whitacre (2008) using 2005 ARMS data, found that only 6.6 percent of U.S. farmers use it to purchase farm inputs. The results from their study suggest that the propensity to purchase farm inputs online is negatively related to farm operator age, and positively related to operator education level and farm size. One reason for this unwillingness to buy online could be the fact that the difference in input prices between physical and electronic purchases is not significant (Batte and Ernst, 2007).

Less is known about adoption and use of computers and the internet by other types of agribusinesses such as input and service providers. However, there is some evidence indicating that rates of adoption and use among them is higher compared to agricultural producers. For example, Ehmke et al. (2001) show that as early as 2000, 79 percent of surveyed agribusinesses comprising farm equipment and service companies in Ohio had Internet access and 16 percent were selling via the Internet.

In terms of research efforts evaluating the effectiveness of specific e-commerce platforms, we are only aware of two state level efforts that focus on the impact of MarketMaker for agribusiness operations in Ohio and New York. Fox (2009) developed and implemented a project involving diverse representatives of the Ohio's food chain including producers, processors, wineries, farmers' markets and distributors. One of the objectives of the project was to explore changes in marketing practices and market access that resulted from the use of MarketMaker. Sixty three percent of Ohio MarketMaker registered producers believed that MarketMaker was helping keep more food dollars in the regional economy. Cho and Tobias (2009) also conducted a survey with New York producers registered in MarketMaker. The average increase in annual sales helped by MarketMaker reported by survey respondents is between \$225 and \$790. Approximately 12 percent of the respondents reported receiving marketing contacts through MarketMaker and using the MarketMaker directory to contact other food industry business partners.

Overall, as the literature review shows, rates of adoption of computers and the internet by US farms continues to increase; however, the development of E-commerce has been relatively slow and mainly limited to the exchange of information. Studies evaluating the effectiveness of specific agricultural E-commerce platforms such as MarketMaker are also very limited. And, little conceptual work has been done to more clearly understand how Internet-based tools like MarketMaker fit within the larger context of farm business operations, especially with how they can be effectively used to facilitate more efficient marketing to retail and wholesale markets.

Logic Models

In order to better conceptualize and communicate this context across MarketMaker stakeholders, the research team began this project with the development of a series of logic models. Logic Models are graphical depictions of rational linkages among a program or project resources, activities, outputs, participants, and short-, intermediate-, and long-term outcomes related to a specific situation (McCawley, 2001). The main purpose of a Logic Model is to provide stakeholders with a clear visual description of the sequence of related events connecting current resources and planned activities with desired changes or results that the program hopes to achieve (W.K. Kellogg Foundation, 2004).

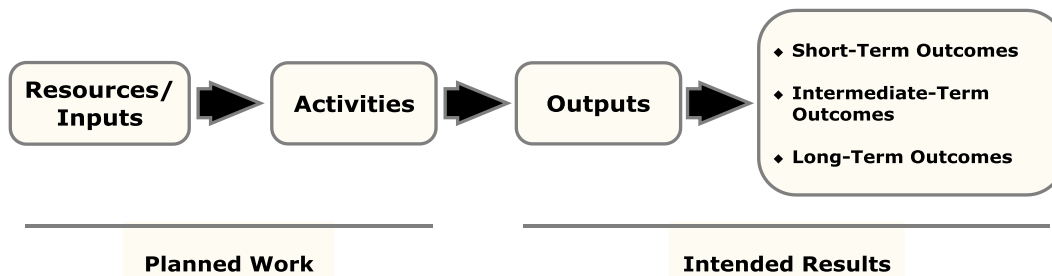
Logic Models or variations of them have been employed in the last two decades as valuable tools in the evaluation and planning of projects or programs. For example, Porteous and Sheldrick (1997) used the Logic Model framework to evaluate the impact of a series of toddler nurturing workshops on the adoption of healthy parenting behaviors by parents of children; Jordan and Mortensen (1997) proposed a Logic Model approach to planning and measuring the performance of research organizations. Other applications of Logic Models are found in areas such as research and development (R&D) (McDonald and Teather, 1997), industrial modernization (Torvatn, 1999), management training (Bell, 1998; Bell, 1999), agricultural technology transferring (Framst, 1995; Sartorius, 1996), community planning (Julian, 1997), and public health (Porteous et al., 1999).

A simple depiction of a Logic Model is shown in Figure 1. First, the logic model differentiates two major components of a program or project: 1) *Planned Work* and 2) *Intended Results*. The *Planned Work* component of the logic model includes the identification and planned use of the resources. *Resources or Inputs* include human, financial, organizational, and community resources as well as other inputs required to support the program such as time and partnerships. *Activities* are the uses given or processes applied to the resources needed to implement the program. Activities include all processes, techniques, tools, events, promotional material, education and training, technology, and actions that are part of the program implementation. These activities are necessary to generate the program's desired outputs.

The second major component of the logic model is *Intended Results* which refers to the program's desired tangible outputs and specific changes in participants. *Outputs* are the measurable, tangible and direct products of program activities. Program outputs eventually lead to desired outcomes, and they help stakeholders to assess how well the program was implemented. Outputs are usually described in terms of the size and scope of the services and products provided by the programs. *Outcomes* are specific changes in behavior, knowledge, skills, status; business conditions and level of functioning that are expected to occur on individuals, groups, organizations or systems if the program is implemented as planned.

Desired outcomes on program's participants can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. Though somewhat arbitrary, specific definitions (e.g. short-term equals 1-2 years) are useful and arguably essential

for goal setting, benchmarking, and measuring the rapidity of progress toward outcomes (Innovation Network, 2005; McLaughlin and Jordan, 1999; W.K. Kellogg Foundation, 2004).



Adapted from W.K. Kellogg Foundation, 2004.

Figure 1. Simple Logic Model Illustration

According to McLaughlin and Jordan (1999) there are four main benefits of using a Logic Model to analyze a project or program. First, a Logic Model helps create a common understanding of the program and expectations for resources, customers reached and results. Second, a Logic Model facilitates program design or implementation by identifying resources and activities that are critical to the attainment of goals or have inconsistent linkages among them. Third, a Logic Model identifies the place of a program within a broader organizational or process context. Finally, a Logic Model helps identify a set of key performance measurement points and evaluation issues; hence, it guides data collection and analysis efforts.

Given that MarketMaker is a complex, multi-faceted, feature-rich tool designed to facilitate successful outcomes for several varied audiences, it is appropriate to have a clear understanding of these features and what they are intended to accomplish. Every feature of MarketMaker – used alone or in combination with other features – is intended to accomplish something useful; produce an outcome directly, produce an output that eventually leads to an outcome, or produce an input that is part of the infrastructure for the production of outcomes. As we consider many of the expected outcomes it is appropriate to consider MarketMaker as an important (possibly necessary, but not sufficient) “input” or “activity” in a broader process that produces desirable outputs leading to outcomes.

When MarketMaker is considered as an input it might represent an adoption of new efficiency-enabling technology that can improve existing processes or it might result in the development of entirely new processes, products, or services. Clearly understanding how the MarketMaker features fit within the broader nexus of complementary and competing activities (e.g. e-marketing training programs, state-wide branding programs, organic certification) can provide important information to position MarketMaker within this broader market in order to maximize its effective use.

The developed sequence of cause-and-effect relationships and logical linkages among a program’s resources, activities, outputs, and outcomes sets the stage for the development of a system of quantifiable indicators that can be used to measure and report on the status of the

most important input, output and outcome categories. A clear understanding of how MarketMaker is supposed to interact with user groups can also help identify forces, trends, or activities that might enhance or hinder the effective use of MarketMaker not currently under the direct control of MarketMaker's personnel.

Clearly understanding how the MM features fit within the broader nexus of complementary and competing activities (e.g. e-marketing training programs, state-wide branding programs, organic certification) can also provide important information to position MM within this broader market in order to maximize its effective use.

III. The Development of Logic Models for the MarketMaker Project

For this project, logic models were developed for each of the major identified MarketMaker user groups. This included producers, consumers, food retailers, food wholesalers, restaurants/chefs, and farmers markets. This section verbally describes the major components and rationale for the accompanying logic models found in Appendix One. Logic model components were identified and organized as inputs, activities, outputs, and outcomes, flowing from left to right in the diagrams. Outcomes were identified as short, intermediate, and long-term. Those components directly tied to the MarketMaker website are contextualized with other components thought to be either important or necessary to combine with the MarketMaker site to deliver the specified outcomes. Economists might consider these components to be complements to MarketMaker in the production of these outcomes. Though one could infer this possibility, no direct consideration of substitutes (alternative Internet-based platforms or other) was addressed in this process.

The final visual display, which appears deceptively simplistic, was the culmination of much thought and discussion on the part of the research team. As one might expect, many of the inputs were either identical or very similar across user groups, especially those directly related to the development of the MarketMaker website and the accompanying education and training intended to encourage adoption and use of this tool. Variations in the models generally increase as one scans from left to right in the diagrams. The similarity across user groups underlines one of the key potential advantages of the MarketMaker effort; economies of scope.

MarketMaker plays slightly different roles in the process of delivering outcomes, depending on the user group and their identified outcomes. Though outside the scope of this project, one could consider empirically evaluating the relative importance of each output (MarketMaker site, training, etc.) based on specific priorities for delivering ultimate outcomes. One would expect this to vary depending on a host of factors, including differences in target user group demographics and readiness to learn or adopt new technology, availability of competitor/substitute resources, and quality/price combinations associated with complementary outputs.

The situation likely varies across and within states, leaving the final “recipe for success” up to in-state specialists and collaborators, who are more likely to understand what will work in their particular situations. However, there is also likely much value in the learning that takes place in the multi-state and in-state cross-agency network of collaboration that the MarketMaker project engenders. Evaluation of this network and its demonstrated and/or potential usefulness is beyond the scope of this project. However, it would be useful to better understand these network dynamics in order to facilitate their potential.

In this project, several logic models were developed for the primary MarketMaker user groups (producers/farmers, household consumers, retailers, wholesalers, chefs/restaurants, and farmers’ markets). Appendix One provides these logic model diagrams and the following sections provide a detailed explanation to accompany these diagrams.

A. Description of Logic Model for Producer/Farmer/Fisherman

[Refer to the diagram on page 45.] Data on producers, farmers, and fishermen is included in the MarketMaker website, providing detailed information about their product portfolio, their geographic location, their contact information, and the marketing channels they use. The generation of this data is the responsibility of the state-level program directors. Some states have chosen to use existing lists to populate the system, while others have chosen to facilitate the direct action of farmers and fishermen to provide their own information. The general advice provided by the national MarketMaker team is that it is better to facilitate this direct involvement of farmers and fishermen so that they can have more ownership over their data. Every business entity in the MarketMaker system can obtain a user ID and password access to their own data, allowing them to refresh their information when appropriate. This alleviates (somewhat) the need for state level resources necessary to maintain the data.

The following sections provide detail on the logic model developed for this user group, organized by the major column headings from the logic model framework.

1. Inputs

Inputs and activities required to achieve producers’ outputs are divided into national, state, county/regional and individual levels. At the national and state levels MarketMaker requires human resources under national and state purview, adequate technology to support program requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker requires sufficient funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers, wholesalers, retailers and farmers markets willing to participate in the program. Producers participating in MarketMaker should have a sufficient level of technical ability in order to succeed in the program.

2. Activities

Using the previous inputs, the MarketMaker system conducts a series of activities focused in achieving the final outcomes. As the national and state level MarketMaker develops, updates and improves the content, usability and functionality of current core site improves. Using the appropriate technology and resources National MarketMaker's technical staff provides technical support, networking and collaboration to actual and potential state-level partners. National MarketMaker purchases, gathers, manages, and distributes relevant existing data (i.e. socio-demographic characteristics, consumer preferences, etc.) to producers looking for specific niche markets. National and State MarketMaker develops training and promotional sessions at national, state and regional levels in order to create awareness and prepare producers to successfully participate in MarketMaker. National MarketMaker is responsible for implementing a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to user groups including producers, retailers, farmers markets' managers, wholesalers and consumers. For registered users, National MarketMaker provides the opportunity to update their personal profile at any moment, giving the chance to producers to announce and promote new products and services in real time.

3. Outputs

The appropriate combination of inputs and activities will lead to the generation of desired outputs. The marketing campaign and the training and promotional sessions conducted at national, state and regional levels generates registration and participation of new producers, wholesalers, retailers, farmers markets and consumers in the MarketMaker program, resulting in an anticipated increase in the demand and availability for products.

The technical support activities (networking and collaboration), acquisition and processing of relevant data, and registration of new participants all contribute to up to date and complete producers' state and national level content in the MarketMaker website. Without this data, MarketMaker's value is greatly diminished.

4. Outcomes

The culmination of the above activities will lead to specific changes in producers' business conditions and behavior; the desired impacts on producers can be classified as short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term, MarketMaker hopes to create initial web presence for some producers and to increase the number of site visits for other producers who already have their own sites. In order to guarantee the accomplishment of MarketMaker objectives it is necessary in the short-run to change producers' awareness, skills and knowledge. For that reason it is relevant at this stage that new participants learn about the benefits of MarketMaker and how to participate in the program.

In the intermediate-term, producers must change their attitudes and behaviors relating to the role MarketMaker plays in their business. For that reason it is important in this period that producers successfully participate in MarketMaker. To have successful participation producers must possess the necessary skills and knowledge to be an effective user of MarketMaker. At

this point MarketMaker has obtained a sufficient level of networking and collaboration between participants and the MarketMaker staff. Also in the intermediate-term producers are easily identified by wholesalers, retailers and consumers that choose to use MarketMaker.

In the long-term MarketMaker portends to assist producers to increase profitability as a result of reduced marketing transaction costs (cheaper advertising, web presence and decreased transportation costs) and an increase in revenues via an increase in purchases from new and existing customers.

B. Description of Logic Model for Farmers Markets

[Refer to the diagram on page 46.] Farmers markets can play an important role in the marketing portfolio of producers interested in efficiently providing high quality products directly to consumers. Increasingly food-savvy consumers and local development efforts have been combined to substantially increase the number of farmers markets across the country in the past several years. In many situations, the binding constraint on the initiation or further development of local farmers markets is the number of producers willing and able to supply the products. Farmers' markets managers are typically involved in identifying and managing the number of vendors participating in these markets. On the other hand, for the long-term success of the farmers market, it is essential that the market is supported and well attended by a sufficient number of consumers. MarketMaker holds potential to help facilitate the identification of suitable producers and to increase awareness of the markets among consumers.

As in previous sections, the logic model for farmers markets is provided in Appendix One and the explanation is provided below.

1. Inputs

Inputs and activities required to achieve Farmers' Market final impacts are divided into national, state, county/regional and individual levels. At the national and state levels MarketMaker requires human resources under national and state purview, adequate technology to support programs requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker requires sufficient funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers, consumers, and farmers market managers willing to participate in the program. Farmers' Market managers participating in MarketMaker should have a sufficient level of technical ability in order to succeed in the program.

2. Activities

Using the previous inputs MarketMaker will conduct a series of activities focused on achieving the final outcomes. At the national and state level MarketMaker develops, updates and improves the content, usability and functionality of the current core site. Using the appropriate

technology and resources MarketMaker's personnel will provide technical support, networking and collaboration to actual and potential state-level partners.

MarketMaker purchases, gathers, manages, and distributes relevant existing data (i.e. socio-demographic characteristics, consumers' preferences, etc.) to Farmers' Market managers and looking for specific vendors capable of providing specific niche products at the market. MarketMaker conducts training and promotional sessions at national, state and regional levels in order to create awareness and prepare Farmers' Market managers as well as participating vendors and consumers to successfully participate in MarketMaker. National MarketMaker is responsible for implementing a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to user groups including producers/vendors, Farmers' Market managers, and consumers. MarketMaker provides registered Farmer's Markets with the opportunity to update their Famer's Market profile at any time, giving the chance to producers participating in Farmers' Markets to announce and promote new products and services in real time.

3. Outputs

The adequate combination of inputs and activities will lead to accomplishment of desired outputs. The marketing campaign, and the training and promotional sessions conducted at national, state and regional levels generates signup and participation of new producers, Farmers' Markets, and consumers in the MarketMaker program, resulting in an increase in the demand and availability of local products.

The technical support activities (networking and collaboration), acquisition, and processing of relevant data, and registration of new participants all contribute to up to date and complete Farmers' Markets state and national level content on MarketMaker website. Without this data, MarketMaker's value is greatly diminished.

4. Outcomes

The culmination of the above activities will lead to specific changes in Farmers' Market business conditions; the desired impacts on Farmers' Market can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term MarketMaker hopes to create initial web presence for some Farmers' Markets and increase the number of site visits for Farmers' Markets that had their own sites. In order to guarantee the accomplishment of MarketMaker objectives it is necessary in the short-run to increase Farmers' Markets' awareness, and participation. For that reason it is relevant at this stage that producers and consumers be willing to participate in Farmers' Markets activities.

In the intermediate-term, Farmers' Market managers, consumers and producers must change their attitudes and behaviors relating to the role MarketMaker plays in their business. For that reason it is important in this period that producers and consumers successfully participate in Farmers' Markets activities. To have successful participation producers and consumers need to possess the necessary skills and knowledge (as described in the logic models for producers and consumers). At this point MarketMaker has reached the adequate networking and

collaboration between participants and MarketMaker staff. Also in the intermediate-term Farmers' Markets are easily identified by producers and consumers that use MarketMaker.

In the long-term MarketMaker portends to increase participation of both producers and consumers in Farmers' Markets. The increased participation and awareness will help insure the success and sustainability of Farmers' Markets.

C. Description of Logic Model for Chefs/Restaurants

[Refer to the diagram on page 47.] For many producers of high quality products, restaurants are an increasingly important part of their marketing portfolio. Restaurants, often led by their chef(s), are interested in sourcing product that allows them to provide unique, high-quality food experiences to an increasingly food-aware consumer base. Consumers are increasingly interested in assurances that the food is sourced "locally", is of high quality, that the means of production are consistent with their values, and that they can know rather detailed information about the source and the process that brought the final product to their table. Even restaurants with less-discriminating consumers are often interested in sourcing product more locally in order to save on transportation costs and to insure higher quality product.

In order to meet this demand, restaurants must be able to efficiently locate producers who can provide them with the product in a manner consistent with their needs. MarketMaker has the potential to help facilitate this process. As with previous user groups, a logic model was developed and is provided in Appendix One and a description is provided below.

1. Inputs

Inputs and activities required to achieve chefs/restaurants' final impact are divided in national, state, county/regional and individual levels. At the national and state levels MarketMaker needs to have human resources under national and state purview, adequate technology to support programs requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker needs to have enough funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers and chefs/restaurants willing to participate in the program. Chefs/restaurants participating in MarketMaker should have a sufficient level of technical ability in order to succeed in the program.

2. Activities

Using the previous inputs MarketMaker will conduct a series of activities focused in achieving the final outcomes. At the national and state level MarketMaker will develop, update and improve the content, usability and functionality of current core site. Using the appropriate technology and resources MarketMaker's technical staff will provide technical support, networking and collaboration to actual and potential state-level partners.

MarketMaker will purchase, gather, manage and distribute relevant existing data (i.e. socio-demographic characteristics, consumers' preferences, etc.) to chefs/restaurants looking for specific niche markets. MarketMaker will develop training and promotional sessions at national, state and regional levels in order to create awareness and prepare chefs/restaurants to successfully participate in MarketMaker. MarketMaker will implement a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to producers and chefs/restaurants. For actual members MarketMaker will provide the opportunity to update their personal profile at any moment, giving the chance to chefs/restaurants to announce and promote new products and services in real time.

3. Outputs

The adequate combination of inputs and activities will lead to accomplishment of desired outputs. The marketing campaign and the training and promotional sessions conducted at national, state and regional level will generate signup and participation of new producers and chefs/restaurants in MarketMaker program and as a result there will be an increase in the demand and availability for niche products.

The technical support activities (networking and collaboration), acquisition and processing of relevant data to MarketMaker and signup of new participants will contribute to update and complete chefs/restaurants' state and national level content in MarketMaker website.

4. Outcomes

The culmination of the above activities will lead to specific changes in chefs/restaurants' business conditions and behavior; the desired impacts on chefs/restaurants can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term MarketMaker hopes to create initial web presence for some chefs/restaurants and to increase the number of site visits to chef/restaurants with their own sites. In order to guarantee the accomplishment of MarketMaker objectives it is necessary in the short-run to change chefs/restaurants' awareness, skills and knowledge; for that reason it is relevant at this stage that new participants learn about the benefits of MarketMaker and how to participate in the program.

In the intermediate-term, chefs/restaurants must change their attitudes and behaviors relating to the role MarketMaker plays in their business. For that reason it is important in this period that chefs/restaurants successfully participate in MarketMaker. To have successful participation chefs/restaurants need to possess the necessary skills and knowledge. At this point MarketMaker has reached the adequate networking and collaboration between participants and MarketMaker staff. Also in the intermediate-term chefs/restaurants and niche markets are easily identified by retailers, producers and consumers using MarketMaker.

In the long-term MarketMaker could help chefs/restaurants to increase profitability as a result of a reduction in transaction costs (multiple sources of local fresh and processed food products and decreased transportation cost) and an increase in revenues via an increase in purchases from new and existing customers.

D. Description of Logic Model for Retailers

[Refer to the diagram on page 48.] For many producers, retail establishments (e.g. grocery stores) are an important and growing part of their marketing portfolio. Selling to retail establishments, rather than directly to consumers, allows producers to focus more on production and less on establishing and maintaining relationships with individual consumers. Retailers need an efficient means to locate producers as they face increased consumer demand and possible profit potential for providing fresh, possibly local, high quality product. MarketMaker has the potential to help facilitate this process. As for other potential MarketMaker user groups, a logic model is displayed in Appendix One and the major column headings are explained below.

1. Inputs

Inputs and activities required to achieve retailers' final impact are divided in national, state, county/regional and individual levels. At the national and state levels MarketMaker needs to have human resources under national and state purview, adequate technology to support programs requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker needs to have enough funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers, wholesalers and retailers willing to participate in the program. Retailers participating in MarketMaker should have a sufficient level of technical ability in order to succeed in the program.

2. Activities

Using the previous inputs MarketMaker will conduct a series of activities focused in achieving the final outcomes. At the national and state level MarketMaker will develop, update and improve the content, usability and functionality of current core site. Using the appropriate technology and resources MarketMaker's technical staff will provide technical support, networking and collaboration to actual and potential state-level partners.

MarketMaker will purchase, gather, manage and distribute relevant existing data (i.e. socio-demographic characteristics, consumers' preferences, etc.) to retailers looking for specific niche markets. MarketMaker will develop training and promotional sessions at national, state and regional levels in order to create awareness and prepare retailers to successfully participate in MarketMaker. MarketMaker will implement a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to producers, retailers, wholesalers and consumers. For actual members MarketMaker will provide the opportunity to update their personal profile at any moment, giving the chance to retailers to announce and promote new products and services in real time.

3. Outputs

The adequate combination of inputs and activities will lead to accomplishment of desired outputs. The marketing campaign and the training and promotional sessions conducted at national, state and regional level will generate signup and participation of new producers,

wholesalers, retailers, and consumers in MarketMaker program and as a result there will be an increase in the demand and availability for niche products.

The technical support activities (networking and collaboration), acquisition and processing of relevant data to MarketMaker and sign-up of new participants will contribute to up-to date and complete retailers' state and national level content in MarketMaker website.

4. Outcomes

The culmination of the above activities will lead to specific changes in retailers' business conditions and behavior; the desired impacts on retailers can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term MarketMaker hopes to create initial web presence for some retailers and to increase the number of site visits to retailers with their own sites. In order to guarantee the accomplishment of MarketMaker objectives it is necessary in the short-run to change retailers' awareness, skills and knowledge; for that reason it is relevant at this stage that new participants learn about the benefits of MarketMaker and how to participate in the program.

In the intermediate-term, retailers must change their attitudes and behaviors relating to the role MarketMaker plays in their business. For that reason it is important in this period that retailers successfully participate in MarketMaker. To have successful participation retailers need to possess the necessary skills and knowledge. At this point MarketMaker has reached the adequate networking and collaboration between participants and MarketMaker staff. Also in the intermediate-term retailers are easily identified by producers and consumers using MarketMaker.

In the long-term MarketMaker could help retailers to increase profitability as a result of a reduction in transaction costs (cheaper advertising, web presence and decreased transportation cost) and an increase in revenues due to increase in purchases from new and existing customers.

E. Description of Logic Model for Wholesalers

[Refer to the diagram on page 49.] Wholesalers, like retailers, can play important roles in consolidating the market for small and large producers, especially those without the requisite skills or interest in pursuing retail or direct –to-consumer marketing channels. Wholesalers, like retailers, are under constant pressure to source high-quality products. MarketMaker can help facilitate efficient identification of new sources of production. A logic model was developed for wholesalers to help clarify the potential role for MarketMaker in this process. As for other user groups, the logic model for this user group is provided in Appendix One and an explanation of its contents is provided below.

1. Inputs

Inputs and activities required to achieve wholesalers' final impact are divided in national, state, county/regional and individual levels. At the national and state levels MarketMaker needs to have human resources under national and state purview, adequate technology to support

programs requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker needs to have enough funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers, wholesalers and retailers willing to participate in the program. Wholesalers participating in MarketMaker should have a sufficient level of technical ability in order to succeed in the program.

2. Activities

Using the previous inputs MarketMaker will conduct a series of activities focused in achieving the final outcomes. At the national and state level MarketMaker will develop, update and improve the content, usability and functionality of current core site. Using the appropriate technology and resources MarketMaker's technical staff will provide technical support, networking and collaboration to actual and potential state-level partners.

MarketMaker will purchase, gather, manage and distribute relevant existing data (i.e. socio-demographic characteristics, consumers' preferences, etc.) to wholesalers looking for specific niche markets. MarketMaker will develop training and promotional sessions at national, state and regional levels in order to create awareness and prepare wholesalers to successfully participate in MarketMaker. MarketMaker will implement a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to producers, retailers, wholesalers and consumers. For actual members MarketMaker will provide the opportunity to update their personal profile at any moment, giving the chance to wholesalers to announce and promote new products and services in real time.

3. Outputs

The adequate combination of inputs and activities will lead to accomplishment of desired outputs. The marketing campaign and the training and promotional sessions conducted at national, state and regional level will generate signup and participation of new producers, wholesalers, retailers, and consumers in MarketMaker program and as a result there will be an increase in the demand and availability for niche products.

The technical support activities (networking and collaboration), acquisition and processing of relevant data to MarketMaker and signup of new participants will contribute to up to date and complete wholesalers' state and national level content in MarketMaker website.

4. Outcomes

The culmination of the above activities will lead to specific changes in wholesalers' business conditions and behavior; the desired impacts on wholesalers can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term MarketMaker hopes to create initial web presence for some wholesalers and to increase the number of site visits to wholesalers with their own sites. In order to guarantee the accomplishment of MarketMaker objectives it is necessary in the short-run to change wholesalers' awareness, skills and knowledge; for that reason it is relevant at this stage that new participants learn about the benefits of MarketMaker and how to participate in the program.

In the intermediate-term, wholesalers must change their attitudes and behaviors relating to the role MarketMaker plays in their business. For that reason it is important in this period that wholesalers successfully participate in MarketMaker. To have successful participation wholesalers need to possess the necessary skills and knowledge. At this point MarketMaker has reached the adequate networking and collaboration between participants and MarketMaker staff. Also in the intermediate-term wholesalers are easily identified by producers and retailers using MarketMaker.

In the long-term MarketMaker could help wholesalers to increase profitability as a result of a reduction in transaction costs (cheaper advertising, web presence and decreased transportation cost) and an increase in revenues via an increase in purchases from new and existing customers.

F. Description of Logic Model for Consumers

[Refer to the diagram on page 50.] Consumer demand for products and services produced through the food value chain is arguably the *raison d'être* for the entire industry. At early stages in this project, the researchers on this project were led to believe that MarketMaker was developed both to help producers find markets and for consumers to find product. However, as the conception of the MarketMaker project has grown, and as the researchers gained important feedback from the focus group process, they have come to believe that MarketMaker is currently positioned to be most successful as a Business-to-Business (B2B), rather than a Business-to-Consumer (B2C) tool.

However, within the MarketMaker network, there is much interest in making MarketMaker much more household consumer-friendly and to reach out to this important audience. Therefore, the development of the logic model for this important user group should serve as the foundation for development of baseline studies and to help guide the future development and adaptation of the site for these audiences.

The following sections provide detail on the logic model developed for this user group, organized by the major column headings from the logic model framework.

1. Inputs

Inputs and activities required to achieve consumers' final impact are divided into national, state, county/regional and individual levels. At the national and state levels MarketMaker requires human resources under national and state purview, adequate technology to support programs requirements, and availability of related public and private data (i.e. National Census and independent studies). Also at the state level MarketMaker funds to support planned activities (i.e. training, promotion, networking, etc.) and there must be producers, consumers, retailers and farmers markets willing to participate in the program. Consumers participating in

MarketMaker should have a sufficient level of technical ability in order to effectively use the program.

2. Activities

Using the previous inputs, MarketMaker facilitates a series of activities focused in achieving the final outcomes. At the national and state level MarketMaker develops, updates and improves the content, usability, and functionality of current core site. Using the appropriate technology and resources MarketMaker's technical staff provides technical support, networking, and collaboration to and with actual and potential state-level partners. MarketMaker purchases, gathers, manages, and distributes relevant existing data (i.e. socio-demographic characteristics, consumers' preferences, etc.) to consumers looking for specific niche markets. MarketMaker develops training and promotional sessions at national, state, and regional levels in order to create awareness and prepare consumers to successfully participate in MarketMaker. The national MarketMaker team is responsible for implementing a nationwide marketing campaign with the aim of promoting the benefits of MarketMaker to producers, retailers, farmers markets' managers, wholesalers and consumers. MarketMaker will help to promote awareness campaigns to buy local products with the objective to inform consumer about the possible benefits of locally growth products.

3. Outputs

The adequate combination of inputs and activities will lead to accomplishment of desired outputs. The marketing campaign and the training and promotional sessions conducted at national, state and regional levels generates registration and participation of new producers, wholesalers, retailers, farmers markets and consumers in MarketMaker program. As a result there will be an increase in the demand and availability for niche products. Also the "locally buy campaigns" conducted via MarketMaker will help to raise consumers' awareness about the possible benefits of locally growth products.

4. Outcomes

The culmination of the above activities will lead to specific changes in consumers' behavior. The desired impacts on consumers can be classified in short-term, intermediate-term, and long-term outcomes according to the time required to achieve them. In the short-term MarketMaker hopes to increase the number of consumer site visits to both MarketMaker's web page and to producers' and retailers' individual sites. In order to facilitate the accomplishment of MarketMaker objectives it is necessary in the short-run to change consumers' awareness, skills and knowledge; for that reason it is relevant at this stage that new consumers learn about the benefits of MarketMaker and how to participate in the program.

Also in the intermediate-term locally grown products are identified by consumers using MarketMaker. In the long-term MarketMaker could help consumers to increase their satisfaction due to more availability of locally provided products. When consumers buy local products they are often thought to be eating healthier, tastier and fresher food, supporting local economies, and contributing less to greenhouse gas emissions due to reduction in food transportation from distant regions.

IV. Gathering Immediate Feedback for MarketMaker Continuous Improvement Process Through Focus Groups with Selected Users

Concurrently with the process of developing the logic models the research team organized a series of focus groups in order to obtain short-term direct feedback from targeted MarketMaker users and to indirectly inform the development of the logic models. In some cases, focus groups were organized but had to be cancelled due to anticipated lack of participation due to scheduling conflicts (Midwest (joint): Ohio, Indiana, Michigan, and Kentucky). In other cases, local host institutions were not able to follow-through with local arrangements (New Hampshire and Washington, D.C.). However, the research team was able to conduct focus groups in a variety of locations. Specifically, Moline, Illinois (3/29/09); New York, New York (10/19/09); two in Denver, Colorado (11/1/09); and Grand Rapids, Michigan (12/9/09)

At the initial focus group in Illinois two MarketMaker national program staff members were present to observe and record the comments. In New York, the two New York MarketMaker principals were in attendance. In Denver, MarketMaker state program leaders from several states (SC, CO, OH, MI, and IL) assisted. In Michigan, state MarketMaker program leaders from Michigan and Ohio assisted.

The focus group meetings lasted approximately two hours. They were held in facilities with computers and Internet access. Following introductions and an overview of the purpose of the focus groups, participants were asked to work their way through a number of activities outlined in an online survey instrument and to reflect upon their experiences attempting to use MarketMaker to facilitate the completion of these activities. Once they had completed these activities, approximately one hour was set aside for the group to discuss another set of questions related to their experience using MarketMaker. [The meeting agenda and online survey instrument are available upon request.]

Summaries of the group reflection exercises are provided in the following sections, in chronological order. Notations on the composition of the group are provided in most cases. The basic format for these group discussions was somewhat altered from site to site, depending on the composition of the participant group, the specific facilitator, and the context of the meetings. It was decided to not use a standardized reporting format for the responses for fear of losing some important part of what the facilitator/recorder was trying to convey.

The results of these sessions were provided in their raw form to the national MarketMaker team soon after the sessions so that they were able to integrate what was learned in the focus groups into on-going product design processes. A conference call was held to disseminate the results to the principal programmer and other staff as they were working with a website designer in preparation for a MarketMaker 3.0 upgrade and wanted to know what we had discovered.

Many of the subsequent improvements in the MarketMaker site can be traced back to this valuable feedback. **It is the strong recommendation of the evaluation research team that**

similar focus groups be conducted at least annually, especially in advance of significant program design changes.

The following sections provide the summarized notes from each of these focus group sessions.

A. Moline, Illinois – 3 March 2009

The first focus group session was held in Moline, Illinois and was organized by Sandy Shetler from the National MarketMaker team. Paul Schuytema, the former head programmer for the MarketMaker project was also in attendance. Their involvement allowed for direct feedback from the session to the MarketMaker National Team, especially those directly involved in working on the site. The session was audio-recorded by Sandy Shetler who provided the written transcribed notes below. Dave Lamie conducted the focus group session. Participant representation: College food service, County Farm Bureaus (2), Producers (6)

Question 1: How do you think businesses like yours will use MarketMaker?

- Give a business exposure/possible exposure to the market. That is crucial. Somebody who doesn't know you could pull your information up on the internet and then make a contact.
- Ability to find products and suppliers that provide what I need.
- Agritourism – a big link for that industry in promotion of it. An avenue for Agritourism businesses to find more information to share with customers about other businesses in the area.
- MarketMaker should be linked to Farm Bureau websites instead of just Extension.
- Opportunity to bring farmers into a computer lab and work through how to use the site. They could then see what is out there – an educational tool to see what other producers are doing, what markets are out there.
- It could help a producer to sell their products by finding other marketing channels.

Question 2: What personal business goals do you have that MarketMaker can help you achieve?

- Over the last 5 – 10 years, there has been real growth into the rural areas. People have purchased 10 – 20 acres. Things have now changed at the state level causing some of that ground to be assessed at a different property tax rate. Individuals may now be faced with producing income off of that land. Household food production.
- Local food movement is big right now. CSAs are becoming more popular. Misconception that a lot of the farmers markets bring in food from other states. Not true for most of the markets in our area.

Question 3: Describe one feature of MarketMaker that you would like to see developed or further developed. (existing feature improved or new feature added).

- Need to be able to select multiple attributes at one time instead of only 1. Simultaneously select multiple search attributes.
- Google search – troubles using it. How picky is it when you enter the words?
- Very little information for some of the farmers markets. Need more detail on them. Each should have more information about the market, type of products grown, season, membership of the market, etc.
- Need to establish some fields for farmers markets to fill in as they register.
- Question on whether consumers are aware of MarketMaker. Consumers need to be told about the site. Better promotion. Hear about Local Harvest but never hear about MarketMaker.

Question 4: What besides MarketMaker will need to be in place to achieve your goals?

- Promotion of MarketMaker to consumers.
- MarketMaker needs to set up at Farmers Markets to let the consumer know about them. That is probably the largest market for the products listed on MarketMaker. This would be most economical way based on a limited marketing budget. For example, have a reusable market bag with MarketMaker on the side of it to promote the site.
- At the farmers market, you could also promote to the producers.
- Farmers Market managers are key to getting the information into that setting. You can let them know but still need a big push at the customer/consumer level.
- Local Radish magazine – put article/ad in it.
- Consumer profiling to determine those who would be most interested in using MarketMaker
- Establish links with American Dietetics Association, American Cancer Society, American Heart Association, hospitals, YMCAs, lawn and garden shows, John Deere Health Fair. Get the word out to people about MarketMaker and where to find local fresh products.
- Promote the local, fresh, good for you themes.
- Promote MarketMaker to culinary departments in the colleges/universities.
- Another excellent association to connect with is National Association of College and University Food Services – international organization. Their national meeting is in Washington DC in the summer.
- “Kids type” consumer page to make it easier for adults to use MarketMaker making searching easier. Have it start right on the homepage instead of having to go to a separate search page. Simplified tool for consumers.
- Training is not an avenue to teach consumers about MarketMaker. Instead work at making the site more user-friendly so they can find things easily.
- Producers will use the site if they are getting customers and sales from the site. If not, they won’t be using it. Results are key! Producer may be a little more tolerant/patient than a consumer.
- Include snippets of information about health related topics or other things that would be useful to the consumer to get them coming back. Like grass fed beef.

- Should there be a different portal to MarketMaker or different name for consumer related site?

Question 5: What additional things must you personally change to make effective use of MarketMaker?

- Time
- MarketMaker is a database but sales are really based on relationships. You can be trained on how to use the site but that still doesn't sell the product.
- MarketMaker is an asset for those who use it; very user friendly for those familiar with computers. When you first look at the homepage, you don't see it – it's not easily identifiable in bold things that jump out on the page – where you find farmers, farmers markets, etc. If you are going to sell it to the people who would really use it, you may have to provide them with training but then you'd have to try and talk them into the importance of sitting down at training.
- MarketMaker could be used like an advertising portal i.e. Facebook. Or a tiered level. Could businesses pay a fee to have greater access?
- Producers need to realize they have a good product to sell and they can use MarketMaker to assist them in doing it.

Question 6: Given what people might be using MarketMaker to try to achieve, what are your ideas on how we might be able to learn from people like yourselves and the benefit it has been to you such as increasing sales, costs, etc.

- Need some way for the business to know how a customer found out about them. When someone is found on LocalHarvest, the contact email lets them know it came from LocalHarvest. Similar thing needs to happen with MarketMaker. Need to be able to trace it to the first contact.
- MarketMaker is one of the best things that has come out of the University of Illinois among others, getting it off campus and out into the field. It's got success that can be built upon. It is a site that those of us in the rural areas have been trying to work on for years.
- MarketMaker needs to become very visible to the consumer. Link anywhere you can so they can become aware of it.

B. New York, New York - 19 October 2009

The second focus group was held on Manhattan in New York City. Cornell Cooperative Extension facilitated the use of a Cornell meeting room and invited participants from across the state of New York.

Participants: certified organic beef farmer, farm representative “From-Farm-to-Chef”, City Harvest food distributor, freelance farm representative, “Master Purveyors” meat supplier/distributor to restaurants, hotels, etc, “Just Food” provider of public access to local foods, extension agent for Suffolk County,

This meeting was videotaped so that the National MarketMaker staff could see the results. The same format as used in Illinois was followed. The transcribed summary follows.

Question 1: How do you think you will use MarketMaker?

- MarketMaker caters to high-end producers, and my job is to raise awareness about elitism in agriculture. There are a lot of people that just want/need regular food and don't have the income for high-end products. How can MarketMaker better appeal to all markets, and not cater to high-end products
 - Follow-up: Was it the questions (in the survey) or the site itself that gave you this impression?
 - Answer: I think it came from the attributes, the questions and the types of businesses. It was highly focused on specialty foods, organics, etc. and I need to use MarketMaker to find food to distribute to the needy and to businesses that do not have budgets for niche products.
- I think MarketMaker could be a big help to Just Foods. We have a lot of low-volume city farmers markets and MarketMaker could help draw farmers to these farmers markets by allowing them to pinpoint spatially how they can work with other nearby markets (restaurants, wholesale, other) to make their trip worth their while.
- I think for my general use of MarketMaker, I'd like to see some descriptions, maybe in a pop-up window, to help me better understand the product attributes.
- Working in Extension, I'd use MarketMaker to help farmers who wish to diversify. MarketMaker could help them find niches where there is a demand but a limited supply.
- *MarketMaker is the ideal vehicle to find farmers/suppliers to supply high-end products to my clients and to find/target new restaurants/hotels/institution for our services.
- Since our farm is just starting out, MarketMaker can allow us to make connections with areas that have a need for our products. We can find markets for various grades of agricultural products/livestock, and can find the appropriate channels to sell these in (ex: non-breeding stock cow could be sold to low-end markets, etc.)

Question 2: What personal business goals do you wish to achieve with MarketMaker?

- I would like to use MarketMaker as an information resource in order to make connections and see available channels. I have a lot of “last minute” buyers and would like to know exactly where I can obtain a product on short notice.
- I would like to see MarketMaker identify and create indicators for underserved segments so that we can work to “bring them up.”
 - Follow-up: When I did a search for lettuce, I got mostly organic. I think this is

because organic producers are younger and more computer savvy, thus are more likely to enter their data in MM. However, I mostly deal with conventional farmers who are older and would need much more tech assistance and guidance. Their main point of sale is through the farm stand, while younger, savvier producers explore many more channels.

- Follow-up: I also found in my search that while most of Just Food's CSA members were represented in MarketMaker, I did not see any of our Spanish speaking members. I feel that MarketMaker could benefit from going multi-lingual, or targeting foreign producers to make them aware of the program.

Question 3: What is a feature you'd like to see developed more or added to the site?

- I had trouble finding specific products through particular venues. For example, I wanted to find potatoes from a farm stand or from a specific zip code. I also wanted to be able to search for multiple products at one time so that I could find a stand or place that served more than one need.
- I would like to have access to better contact information. I think it would be nice to see all of the contact information, such as phone number, address, email, etc. up front instead of having to click on various icons.
 - Follow-up: The magnifying glass is counter-intuitive. I did not know that there was more contact information on the farmers because I did not know to click on that icon. I think that instead, the name of the farm should be hyperlinked to the details page with all of the appropriate contact information, maps, and additional farm attributes/descriptions.
 - Follow-up: I think it would also be helpful if the maps were made more separate. For example, I was confused as to which link/icon represented the Google map to the farm, and which icon showed the MarketMaker generated map.
- I'd like to see a feature that displays seasonal availability of products.

Question 4: What besides the MarketMaker site needs to be in place to allow users to achieve their marketing goals?

- I think that users would find a lot of satisfaction in being able to purchase the products they've located through the site on the spot with the use of a "purchase button" feature. I think that they'd have much more satisfaction and a greater return rate if they had the option to purchase online instead of only having a list of phone numbers to call or an address to visit. Also, how else would you know the success rate for individual farmers without some sort of measure of point-of-sale data?
- I think that in general, the MarketMaker name is a barrier. MarketMaker sounds like an economic service and doesn't relate to me to farming/food. I'd like to see something using the keywords of local, food source, farm, green, etc.
 - Follow-up: When I Google Market Maker I get a stock market rep.
 - Follow-up: I think it should be something like "farm connect," "local connect," "food source"

- To me the website seems to be too busy. It needs better branding and graphics. I think it needs to be “prettier” and more intuitive.
- When getting deep into the search features, it’s almost faster to just Google the keywords you are looking for (ex: potatoes, wholesale, zip code) than to go through all the search levels.
- There needs to be a way to find available markets...such as unique marketing institutions. When I searched for a wholesale channel, there was no distinction between wholesale buyers and sellers. And what about the markets that fall in the “other” category?

Summary of needs:

- pop-up windows describing product attributes, or to give help tips
- multiple attribute search capabilities and better cross-over (i.e.: potatoes, farm stand, zip code)
- easier access to farm/business description and contact info via clickable “name” and/or more intuitive icons; separation of map icon and some text to go with each icon seasonal availability, maybe in the form of a field in the entry form for producers, so that they will automatically add that information...this could also tie into a chart of some sort from that data
- multi-lingual site or better marketing to non-English speaking segments
- purchase option for online purchasing through MarketMaker
- Renaming of the site to relate to the average user (example keywords: local, green, farm, food)
- Prettier, more intuitive site...better branding
- Addition of more unique marketing channels...an “other” category

C. Denver, Colorado – 1 and 2 November 2009

The third and fourth focus groups were held in conjunction with the Food Distribution Research Society (FDRS) annual meetings near Denver. The Colorado MarketMaker team identified the participants and coordinated local space for the event. The first of these sessions was to focus on local constituency groups (producers and chefs). Turnout was extremely low for this session (2 participants) and we also experienced severe technical difficulties resulting in a one-hour delay. The results from this session were combined with those of the second session. The second session was marketed toward FDRS attendees, resulting in approximately eight participants. The same format was used as in previous focus groups. The results follow:

Question 1: How do you think other people like yourself are going to use MM?

- ... market research tool for to see what other people in their category in other states are doing (non-competitive markets)

- Prepare for Department of Agriculture Marketing workshops – standard 4Ps – out of real space... now have other examples – how businesses created online presence.
- Use in the classroom for target marketing – demographic tool
- Find businesses – specifically organic and link them with buyers
- Work with buyers to find producers (product sourcing)
- Encourage producers/farmers to look more broadly for markets
- Tell producers – free way to get a web presence ... even without their own website.
- Producers can use for their business plan – how easy is it to print? How to pull out 20 out of a list of 200?
- Based on what I've seen in 1-1/2 hours, I would send my producers to Local Harvest – which seems more like a consumer website. Payoff is less than you anticipate – difficulty in registering and using – seems like there is a sheet of glass between you and the data
- MarketMaker seems more like a research site – Research Tool (language, visuals, navigation)
- From example – if I was Olga, I would be frustrated – too murky.

Question 2: What are some of the things that could be changed to address challenges you faced.

- Why MM vs LocalHarvest – flavor of Local Harvest has a 'value system'.
- Local Harvest does have user-friendly tabs on top – beautiful graphics with their categories vs. drop-down boxes.
- Dropdown boxes can be tough to navigate.
- Misunderstood 'food preferences' (instead of organic and familiar terms– food consumption data)
- Search – users don't read instructions – keep things brief ... search terms do not seem intuitive
- Find Market vs, who are your customers?
- Questioned credibility in census demographics (American Indian population in various areas of CO seemed questionable. Also, in demographics – what is unit of measure- individuals, households, # per ...?)
- Key in demographic too small – and other fonts too small
- Key does not provide enough info.
- Source of data could be more clear – for demographics and food consumption data
- No back button – had to re-start search
- When using the map ...First time I did restaurants & there weren't any...Then I did farmers markets...Then I tried grocery stores...They all seemed to get mixed up
- Dropdowns re-set data but does not refresh map (or vice versa) – HAVE to re-set data?
- General lack of clarity on navigation – not very easy
- Searching for a product – had to muddle through to find a product by keyword – or to find by characteristics within category - not very clear

- When got a no result – You MUST look at tabs – Had to go to gray bar – which most people missed.
- Didn't find category – eggs ... under meat? RE-label – dairy and eggs...Some people looked under specialties
- Two target areas ... Try to find business – select business type – expected to get to dairy products... didn't realize I had to go to producers first...What I wanted to find was a farmers market that sells dairy products – not dairy producers who sell at farmers markets
- Now that she knows there is a Google Search engine – that is all she will use – she knows how to use advanced search within Google
- Have a distinct consumer side and a business side – just like the Buy/Sell Forum
- One person started at the Forum

Question 3: Describe one feature of MM you would like to see developed/further developed

- Natural language queries – let me type in farmers markets that sell bok choy / flat language query –
- Translate between the two? Like the old Ask Jeeves site.
- Don't have it all drill down.
- Do a feature of the day/week – feature a producer – push marketing –
- Or feature seasonal
- Who would do this? University or Dept. of Ag.... (Partners) Thanks for hosting field day
- A little governmental -

Question 4: What was completely missing as you tried to do these activities?

- (not really missing) A lot of good info.,... but...I just don't feel like I'm in control. Felt like a game where the computer had to guess what I was thinking and I had to trick it – learn to talk the way it does – to get what I want.
- Narrower pathway to local foods
- Add some info on food attributes of what people are looking for
- Puzzle pieces / info. is there - Need to package and merchandise better – like the puzzle is together
- I'm looking at an enormous library – books aren't where I thought they would be (analogy)
- Search -- Start with the product

Question 5: Let's assume MM is available to you – and some of the issues are resolved in a positive way. What other tool/s do you need to have in place to achieve your goals? (from various perspectives)

- Who does the user call if they have questions/ Tech. Support
- Is there a value added for being registered?...Additional search capacity...?...Dawn – could be listed as a trade lead (to chef or other buyer,...)...Producer could opt out of it
- Buy/Sell Forum – targeted opportunities for business relationship -- Admin. Reports

- If there were common tech assistance calls, we could put info. in newsletters,... common leads / common search terms (3-5 years out)
- Currently consumers do not register +/- ... might be able to gather consumer preference information?
- Add on I would like – is ability to do reports – extract data
- Select 20 from a list of 100 and create a new data file I could use for follow-up and business plan...

Question 6: Do we need to put resources into training? And what do we need to do in terms of promotion?

- Train Extension personnel – if they are answering questions about it ... They are major influencers – you don't want them frustrated with it
- Also train other state agencies involved in promoting MM – Dept. of Ag. NCRS, FFA/VoAg teachers
- FB, Farmers Union,
- Don't think do this via tutorial or help file...Don't Make Me Think – good book ---Should be a human being – go to the Extension office – SHOW them how to use it
- Don't leave local Extension involvement to chance

Question 7: Anything else from your notes... from your experience that you think it's important for the MM team to know? (constructive criticism)

- Little icons don't really do anything – wish I could click on the fish and find fish
- More information on – when you go to a specific company – more info – quantity production
- Blue book info – payment terms / reputation
- Make available in Spanish

D. Grand Rapids, Michigan – 9 December 2010

The final focus group setting was in conjunction with the Great Lakes Fruit and Vegetable Expo in Grand Rapids, Michigan. A heavy snowstorm curtailed participation, but we still had seven participants from five businesses take the survey and three stayed on for the discussion that followed. Michigan MarketMaker team members organized the computer lab facilities. An Ohio MarketMaker team member co-facilitated, allowing the PI to leave on a flight before being trapped by snowfall. The same format of an on-line survey followed by a structured discussion was followed. The survey instruments and results are available upon request. The discussion summary follows.

Question 1: What were your first impressions of the MM site?

- I know it helps because I have had customers tell me they found us through MarketMaker, but I never really navigated through it before. They contacted us via email and in person and we sold more products because we were found through MM.
- I was a first time user – saw in the Expo booklet. I had wanted a match.com for apples ... I wasn't aware of MM, but I wish I had been aware of it earlier since we had so many apples.
- I hope this takes off and gets into even more states – I sell to others out of state.
- People find me now via Allaboutapples.com
- Googled apples Michigan and MarketMaker didn't come up.

Question 2: How do you see yourself using the MM site in the future?

- Help improve our visibility – we'll need better keywords to make this a really good marketing tool.
- MM could help people find us (theredbirdfarm.com)
- I will use the site – look for fruit distributors and new markets. I also look at competitors (and potential collaborators)

Question 3: What particular features did you find most useful?

- I can keep my MM list updated – which I do – even more so than my webpage updates. Glad we can change it as our business changes.
- Like the mapping. Like multi-state.
- Having the profile is nice – wish user name and password was automatically generated. New user wishes he could access Buy/Sell Forum now. I'm in NOW, while I have time – don't make me wait.

Question 4: Which particular features did you find most disappointing?

- Keyword search needs improvement. Make it easy to find product as a starting point – then narrow down by state....
- Looking to buy – only 10 listings and looking to sell is 60+ listings
- Where/how would I find food coop buyers?
- When searching – change search parameters with automatic refresh.
- I don't like to scroll, flip back/forth – could we have split screen or pop-up screen. (like in Kayak.com or sidestep.com)
- Limit scrolling throughout the site.
- I struggled with the mapping. I am familiar with my state, but when I searched in other states, I am less familiar with the area, making selection of counties difficult since I am unfamiliar with where the counties are in other states.
- Search feature only lists 10 results at a time – let user choose – show 10, 25, all... (Example – Holiday Inn - Priorityclub.com)

Question 5: Which particular features should be added?

- Want people to see ALL of the products we have – if they search meat, I want them to know we also sell herbs and other things we mention in our description.
- I'm registered as a producer now – rather than a whole new profile, I just want to add Wholesaler, agritourism, etc.

Question 6: Which particular features should be dropped?

- Nothing noted.

Question 7: What other advice would you like to provide to the MarketMaker development team

- The navigation really takes some getting used to – many people probably won't take the time to fumble through. I would attend training, but many will not.
- All of the stuff at the bottom of the page is confusing.
- Make MarketMaker more visible – to current users, other types of businesses, to consumers, ...
- Clarify nomenclature for big business types – (C. H. Robinson – are they an aggregator, wholesaler, distributor,...)
- Market more to producers and to BUYERS.
- Provide education on how to make the most of MM.
- Now that I better understand MM, I will tell buyers about MM.
- Website URL should be easy to remember --- like marketmaker.com
- Visually, my eyes go to the largest thing on the screen – which is an image of the state. Overall, the page is busy and the title is the largest thing – in fact sponsor logos are almost as large as the title of the site. Forum and Blog icons get lost too due to size.
- What I would like to see – click on icons like the beef to just go where I want to go.
- Good resource – hope it takes off.
- Why is one producer – Fruit Acres – in bold in the listings – showing an enhanced listing?

Question 8: OTHER - What do you think of the name?

- I like it, but should consider other options –market match

Summary Observations From Focus Group Activity

Over all, focus group participants seemed to like the idea that Land Grant Universities and state departments of agriculture were collaborating on a project to help leverage the power of the Internet for the benefit of a broad array of producers and other food sector constituencies. There seemed to be a reasonable level of trust that the MarketMaker project would not devolve into a tool to benefit only some participants in the industry.

However, there was quite a lot of concern expressed about the current usability of the site and the ability of (especially) unsophisticated users to easily leverage this investment for their benefit. There seemed to be less concern with the ability of more sophisticated or more highly-capitalized users since they would be more likely to be able to dedicate resources to training and effective use of the site. There was a lot of concern expressed about the “busyness” of the site. Given the mission of the MarketMaker project to serve all constituencies in the food sector, this is to be expected. Various applications within the site have been developed to serve these various constituencies and the site has rapidly evolved. One of the most often repeated critiques of the site is that it was not sufficiently targeted to any one particular group’s needs and, therefore, was not of as much value as it would be if it were more refined according to these needs.

One possible approach to dealing with this conundrum is for the site to be divided into separate portals, each targeted to specific audiences, leveraging the core data structure across many of these portals. This approach could result in a number of sites stripped of features not found to be relevant to the target audience. The core site could remain somewhat busy and serve as a virtual laboratory for application development. Advisory groups composed of individuals with specific interests in these target audiences could be developed and targeted focus groups and evaluation measures could be put in place for each. Priorities for program and site development of these targeted portals could be set by a consensus of state partners facilitated by the overall program advisory structure.

Much of the feedback from the focus groups was directly provided to the development team as they worked on MarketMaker version 3.0. Some efforts were made to better segregate and explain site features. The overall appearance of the site was improved. But, there likely remains much work to do to achieve the full potential of the effort. Even so, the foundation has been laid for a program that has potential to live up to its promise, especially if an evaluation process is put in place to gather useful feedback, to discuss its implications, and to decide collaboratively how to proceed with further development of the program.

V. Exploiting Site Diagnostic Data

One of the goals of this project was to assess the potential of and maximize the use of assessment tools internal to the MarketMaker website. The motivation for this was to take advantage of the information available through these means and to help guide the development of secondary data collection efforts. This is especially important as there is a need to monitor the impact of the MarketMaker site with regularity. Given the cost of secondary data collection via surveys is much more expensive than collection of data directly from the site, the prospects for meaningful data collection are greatly enhanced if the need for secondary data collection is minimized.

At the first focus group in Moline (where Paul Schuytema, former head programmer for MarketMaker, was in attendance), we surfaced the idea of MarketMaker beginning to use

Google Analytics to help them glean more information from the site(s). They implemented this approach soon after. Google Analytics has become somewhat of an industry standard for collection and analysis of website-specific data. Google Analytics (GA) is a free service provided by Google that collects, summarizes and presents information about the quantity and quality of the visitors to a specific website. Since February 2009, GA is being used by MarketMaker allowing its personnel to gather and analyze valuable information related to the website traffic and marketing effectiveness at both the national and state levels. GA information currently collected by MarketMaker and its potential use includes the following (Ostrow, 2007):

Website visitors – This feature includes a report of the total number of visitors to the website during a specified period of time, the number of unique visitors, average number of pages viewed within the website by each visitor, and the average time each visitor spends on the website.

Bouncerate – The bounce rate tells the website administrators the number of users that come to the site and leave without going any further. This feature also allows site administrators to see how the bounce rate varies across different pages (e.g., between and within MarketMaker state sites).

Visitor loyalty – This feature allows administrators to track the frequency that website visitors return to the site.

Technical profile – Among other things, GA's technical profile allows site administrators to know the browser type, internet connection speed, and preferred languages used by site visitors.

Traffic sources – Traffic sources refer to the way in which visitors come to the website. Traffic sources include direct traffic, referring sites, or search engines. Direct traffic includes typing the site's URL in the browser as well links from a variety of non- environments. GA classifies a traffic source as a referring site when a visitor comes to the website by clicking on a link in a partner website or a non-search results page. Search engines visits are those that come from a search engine website such as Google, Yahoo, Bing, etc.

Keyword source – This feature helps site administrators to track what people are typing in search engines to find the site.

Exclude internal traffic – GA lets site administrators filter out traffic from specific visitors.

Top content and exit pages – This feature helps to identify the most popular pages in a website since it provides information on the number of times a page has been viewed and the time spent by the average visitor on each page. The feature also points to the pages in the site where users' visits most commonly terminate.

Site overlay – This feature opens up the site and allows the administrator to mouse over the sites' links in order to analyze the relative clicks on each menu item.

Geo overlay – This feature allows the administrators to see where the site traffic is coming from (geographical location) and how the site is performing in above mentioned metrics by country, state, county, city, or even within a specific number of miles from a specified location compared to the website’s total or average values.

Comparing date ranges – This option allows users to compare the performance of a site during two time periods using any of the metrics mentioned previously.

Create and email reports –GA allows the creation and sharing of automatic customized reports for a specific period of time and any of the metrics mentioned above. The frequency of the reports (daily, weekly, monthly, or quarterly) can be set up by the user.

Using GA as the source, a monthly report is sent to all MarketMaker state coordinators regarding the performance of their own state site on selected metrics described above. Specifically, the report includes the number of visits, number of absolute unique visitors, pages viewed and average number of pages viewed, average time on site, bounce rate and the percentage on new visits. The report also allows MarketMaker state administrators to identify the main traffic sources and the type of browser used by visitors. Finally, a map overlying the geographical location of visitors and the top content of the site is presented.

There are other GA tools that could be collected by MarketMaker personnel using GA, but they would require further configuration and setup. These tools include the following:

Setting Goals – GA allows the user to set specific goals in each collected metric and to track their progress relative to these goals. This tool would be especially useful for state level site coordinators as they work with state level program advisory committees in strategic and program planning efforts.

Local Conversion Data – Once a website’s goals have been set, the site administrators can track the site progress towards achieving the goals by different locations (country, state, county, or city).

Complete AdWords Integration – If a site advertises through Google AdWords, GA provides information (number of displays, clicks, and local conversion data in any defined goal) on the impact of a campaign, group, and keyword on the site. This feature could be very useful if MarketMaker supports electronic transactions in the future since GA automatically calculates the gross gain (revenue minus the cost of getting the customer) for each transaction.

It is important to mention that none of the GA features and metrics are directly related to the outcome metrics suggested by the logic models. However, a good performance of the MarketMaker website, as measured by the GA statistics metrics mentioned earlier, could lead to achieve some of the long term goals of MarketMaker. These measures deal directly with the performance of the site and are considered important inputs necessary to produce desirable outcomes. For example, a high number of visitors to the MarketMaker site seeking specific food

related products – parameters captured in GA by the number of visits to the MarketMaker site and Business Search Results page within the site – could result in potential customers to producers or Farmers’ Markets.

It is highly recommended that the national MarketMaker team proceed with setting up the full range of GA tools available, that they develop analytical and management capacity to use these tools effectively, and that they train state PIs to become more adept at using these important site management tools. This information should become a regular feature of the agendas of the MarketMaker Policy Advisory Committee and State PI meetings. It should also be included in individual state-level consultations from the national program, and should be integrated within both national and state-level strategic planning processes.

VI. Metrics Based on Logic Models

The next phase of the project was to develop a set of quantifiable metrics directly associated with the logic models. Logic models provide the conceptual framework to help the researchers and stakeholders better understand the interconnections between the identified elements of the MarketMaker site and the environment in which it operates. Developing metrics to evaluate the performance of each of these elements is a necessary step in the direction of being able to take appropriate action to enhance this performance.

The development of metrics involved an iterative process whereby the Clemson research team developed preliminary sets of indicators based upon their own knowledge of MarketMaker user groups and their extensive experience with survey research design and implementation. The MarketMaker Evaluation Committee reviewed these metrics and made recommendations for improvement. Given the resource allocation required to develop metrics and to design and implement surveys across all MarketMaker states, the Clemson research team found it necessary to prioritize this activity for selected user groups. The MarketMaker Evaluation Committee was asked to prioritize these groups. They prioritized producers, farmers markets, and wholesale distributors as the highest priority user groups for this activity. Tables 3 through 5 provide both currently existing and future necessary metrics identified for these priority groups.

Table 3. Proposed Metrics for the MM Producer Logic Model

Outcomes	Metrics	
	Currently Existing	Future Necessary
Short-term		
New producers participating	Number of new producers registered.	
Initial web presence through MM	Number of producers with initial web presence through MM.	
Additional web presence through MM	Number of producers with additional web presence through MM.	% change in number of hits in website due to MM.
Intermediate-term		
Number of additional contacts through MM (E-mail, etc.)		Number of new contacts through MM. Number of new contacts due to MM (e-mail, phone calls).
Number of additional customers through MM (Individual and Institutional)		Number of CTP ^a contact through MM by e-mail. Number of CTP contact due to MM (e-mail, phone calls).
Number of new partnerships (Horizontal and Vertical)		Number of PTP ^a and BTP ^a contact through MM by e-mail. Number of PTP and BTP contact due to MM (e-mail, phone calls).
Long-term		
Increase in revenues (sales * price)		Number of transactions due to MM. Monetary value of these transactions. % change price received. % change in amount sold through MM.
Change in marketing costs (time and Money)		% change in time spent marketing products. % change in marketing expenditures.
Change in risk due to new partnerships initiated due to MM		% of sales contracted through MM.

^a CTP = Consumers to Producers, PTP = Producers to Producers, BTP = Business to Producers.

Table 4. Proposed Metrics for the MM Farmer Market Logic Model

Outcomes	Metrics	
	Current	Future
Short-term		
New farmer market participating	Number of new farmer markets registered.	
Initial web presence through MM	Number of farmer markets with initial web presence through MM.	Growth in farmer markets with initial web presence through MM.
Additional web presence through MM	Number of farmer markets with additional web presence through MM.	Growth in farmer markets with additional web presence through MM.
Intermediate-term		
Number of additional contacts due MM (E-mail, etc.)		Number of new contacts due to MM (e-mail, phone calls).
Number of additional vendor through MM		Number of additional vendors through MM and changes in their compositions.
Number of additional customers through MM		Number of additional customers through MM.
Number of new Horizontal partnerships		Number of new relationships formed through MM.
Long-term		
Growth in farmer markets		% change in total sales. % change in variability of total sales. % change in prices received in quantities sold. % change in costs of operation of farmer markets

Table 5. Proposed Metrics for the MM Wholesaler Logic Model

Outcomes	Metrics	
	Current	Future
Short-term		
New wholesalers participating	Number of new wholesalers registered.	
Initial web presence through MM	Number of wholesalers with initial web presence through MM.	
Additional web presence through MM	Number of wholesalers with additional web presence through MM.	% change in number of hits in website due to MM.
Intermediate-term		
Number of additional contacts through MM (E-mail, etc.)		Number of new contacts through MM. Number of new contacts due to MM (e-mail, phone calls).
Number of additional buyers through MM		Number of RTW ^a contact through MM by e-mail. Number of RTW contact due to MM (e-mail, phone calls).
Number of new partnerships (Horizontal and Vertical)		Number of WTW ^a and PTW ^a contact through MM by e-mail. Number of WTW and PTW contact due to MM (e-mail, phone calls).
Long-term		
Increase in profits: (sales * price) - costs		<u>Revenues:</u> Number of transactions due to MM. Monetary value of these transactions. % change in price received. % change in amount sold due to MM.
		<u>Costs of products:</u> % change in price paid for products. % change in quantity purchased.
		<u>Marketing cost:</u> % change in time spent buying products. % change in time spent selling products. % change in advertising expenditures

^a RTW = Retailer to Wholesaler, WTW = Wholesaler to Wholesaler, PTW = Producer to Wholesaler

VII. Development of Preliminary Survey Instruments and Preliminary Thoughts on Data Analysis

The next step in the process was to develop preliminary survey instruments. Questions included in the survey instruments were based on the metrics presented in the previous section. The survey instruments also included questions related to the characteristic of the business and the respondent.

Surveys were developed to evaluate the impact of MarketMaker on several levels (short, intermediate and long-term). For example, in the case of producers using MM, and as shown in the metrics (Table 3), in the short term the impact will be constituted in producer participation, creating initial web presence for some producers and increasing web traffic for producers with own web-sites. These effects can be captured by web statistics currently collected by MarketMaker and questions 8, 14 and 15 of the producer survey. In the intermediate term, the producers' participation in MarketMaker may result in an increase in the number of contacts and consumers through MarketMaker, and an increase in the number of horizontal and vertical partnerships. These effects can be captured by questions 6, 16, 17, 18a, 19a and 20a.

In the long term MarketMaker may increase the revenues of producers, decrease the marketing costs and reduce operation risks due to new partnerships initiated with the help of the presence and use of the site. These perceived impacts can be captured by questions 11, 12, 13, 18b, 19b, 20b, 21, 22, 23, 24, 25, 26 and 27. Finally, other questions are included to provide feedback to MarketMaker personnel regarding the use of this tool, factors that affect the use, and potential areas for improvement. Please note that since these long term effects are likely the most important information that everybody is interested in, we made a strong effort to ask about the impact of MarketMaker on profitability from several different angles. This will insure that we get more usable data and will be able to evaluate validity and reliability of these data.

These preliminary survey drafts were developed and shared with the MarketMaker Evaluation Committee in Destin, Florida at the Food Distribution Research Society Meetings on 10/16/2010. The overall consensus was that these instruments were too lengthy so we recommend future work to refine the instruments using the feedback of MM administrators at the national and state levels.

Data Collection

The overall success of the implementation of data collection through the survey instruments will depend on the quality and quantity of the data collected. The quality of the data should be ensured through the extensive development and pre-testing of the survey instruments. The quantity of the data can be ensured by limiting survey length, selecting the appropriate time of the year and implementation format for each user group, and providing motivation to the users for completing the survey (e.g., economic incentives).

Data collected during users registration to the site provides the contact information of the entire population of registered MM users (about 7,500 as shown in Table 1). Moreover, since the registration information includes the e-mail address for most of the users,

the survey could be conducted via e-mail complemented (when needed) with mail surveys for those users that do not provide an e-mail. A limitation of the proposed approach is that the survey is limited to MM users. Future evaluation work could include the development of surveys that compare business outcomes of users and non-users.

Survey Data Analysis

The first part of any survey analysis should involve the calculation and interpretation of basic summary statistics (mean values, proportions, etc.) of the survey responses. In our context, this can provide a broad picture of users' utilization of the MM site, users' perceptions of MM compared to other marketing websites, and also users' perceptions regarding the impact of MM for their marketing efforts and the profitability of their operations. These summary statistics should be calculated (when possible) for each state as well as at the aggregate level.

More detailed analysis of the data will require the use of more advanced statistical/econometric methods and could involve, for example:

1. Analysis of the relationship between short-term, medium term and long term outcomes using multivariate statistical techniques (e.g, regression and correlation analysis). If short term outcomes are found to be important determinants of long term outcomes, this information can be used to project the long term impact of MM based on information that can be gathered within the MM website. The relationship between long term outcomes and short term outcomes can also shed light on the MM features that are more likely to result in positive outcomes for the users.
2. Calculation of average values of all outcomes measures which are required for the calculations of the economic impact of the MM website at the aggregate level (state and national).
3. Analysis of the relationship between long term impacts and users characteristics. Information of this type might prove useful for the MM personal in their efforts to tailor the website to the various groups of producers that use the website.

Aggregate Costs and Benefits

The final objective of the evaluation of MM should be the analysis of the aggregate costs and benefits of the site. Results from point 2 above can be used to calculate aggregate benefits at the state and national levels whereas than cost estimates can be obtained from each of the partner states and the national MM team. Both current as well as projected benefit should be included.

Thoughts and Recommendations from the Research Team

We sincerely hope that our efforts to develop an on-going evaluation framework for the MarketMaker project will be of substantial use to those involved in its on-going development and implementation. We are grateful for the comments received during our presentations of preliminary results at several academic venues (Appendix Three). Our reaction to these comments helped us to make changes in our approaches at key points in the project, and to strengthen the overall outcomes of our project.

Overall, the research team finds that the MarketMaker program is one of the most complex (and, potentially, best) multi-state, multi-disciplinary, multi-constituency collaborative Extension outreach efforts in the country. Though our work did not directly deal with evaluation of the network of talented and well-positioned individuals and institutions, this network is clearly evident. As the logic models we developed clearly indicate, the importance of this network to help provide the foundation for MarketMaker website and related program development efforts is of utmost importance. In these current times of economic stagnation and fiscal restraint, a broad base of support is necessary for program survival. MarketMaker represents a valiant effort to develop a public infrastructure designed to support a broad constituency of interests.

It is the strong recommendation of the evaluation research team that focus groups similar to the ones conducted in this project be conducted annually, especially in advance of significant program design changes. Carefully conducted focus groups can help identify problematic situations prior to implementation and can also serve to generate new, innovative ideas. Carefully considering who should be involved in these focus groups is important. Targeted user groups can provide valuable direct feedback. Including key program personnel and representatives of key stakeholder groups (e.g. program funders) as silent observers can be a powerful tool for program development. As the purpose of the focus groups is evaluative in nature, making sure that program staff are not directly involved in promotional activities either before or during the session is of utmost importance. In order to insure the objective nature of these activities, a third party should likely be employed to implement, though program staff could serve to help design the process toward high priority programmatic goals.

It is highly recommended that the national MarketMaker team proceed with setting up the full range of Google Analytics tools available, that they develop analytical and management capacity to use these tools effectively, and that they train state MM coordinators (PIs) and their respective personnel to become more adept at using these important site management tools. This information should become a regular feature of the agendas of the MarketMaker Policy Advisory Committee and State PI meetings. It should also be included in individual state-level consultations from the national program, and should be integrated within both national and state-level strategic planning processes. Given that many key individuals may not find it possible to participate in face-to-face meetings, training resources should be made available using contemporary media (e.g. video tutorials) so that individual state program leaders are not required to develop their own resources. Organizing the development of these materials at the national level also insures program consistency and integrity.

On a related note, more clarity is needed to differentiate and clearly explain the roles and expectations of national and state level resources. The logic models developed in this project can be used to guide this process, but even more detail is likely necessary. For instance, many state leaders have been involved in efforts to secure funding or to develop innovations that benefit the entire network. They seem to do this based on the assumption that other states and the national level team will reciprocate and free-riding behavior will be minimized. But, there is no guarantee that this will occur. Future state level participation and investment of resources will require that program leadership clearly articulate the shared benefits of state level innovation and reciprocity. Core funding acquired at the national level will need to be shared equitably with the states, perhaps based upon their level of personal and monetary investment in the project. Excellent communication about the changing nature of these roles should be part of the on-going strategic program planning process.

In addition, we recommend that the logic models developed in this study be revised by the MM Evaluation Committee in consultation with state leaders on a continuous basis as they develop and update the program strategic plan. Logic models provide a rational and organized way to identify resources, processes and expected outcomes. They can help new states coming into the network to make informed decisions about the resources required for program success. They can be revised when environmental or technological factors change. They can provide a somewhat sophisticated framework for overall program management and leadership.

The final objective of the evaluation of MM should include the analysis of the aggregate costs and benefits of the site. Since the site does not collect information needed for this type of analysis, we recommend using surveys to collect the required data. Preliminary survey instruments (available in this report) based on logic models and metrics revised by several MM stakeholders can be used as a starting point of these efforts. Moreover, to make data comparable across time and space (i.e., across states), evaluation efforts and survey implementation should be coordinated by the MarketMaker Evaluation Committee.

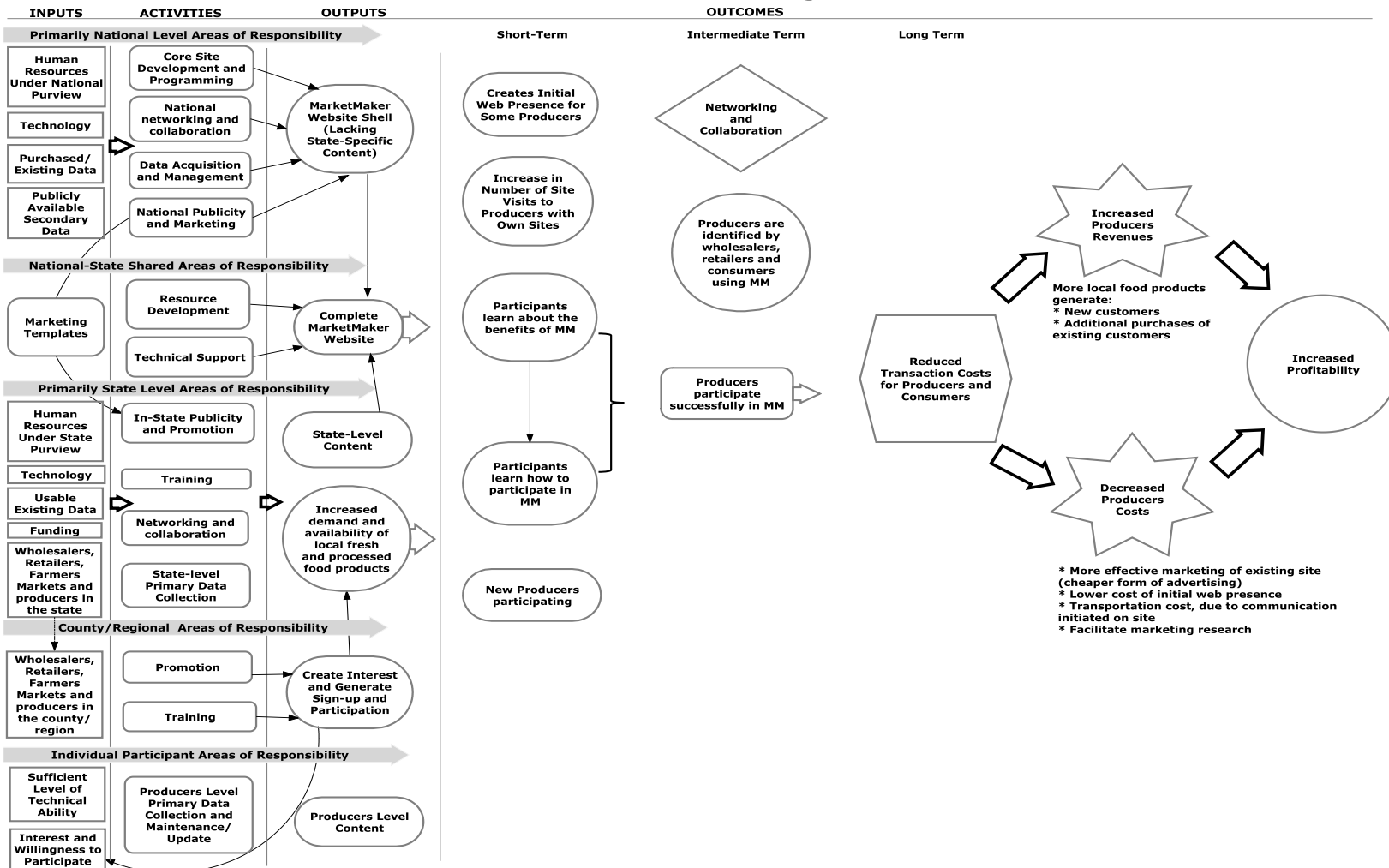
Finally, future work plans for evaluation survey implementation, based upon the foundational work done in this project, should be developed under the auspices of the MarketMaker Evaluation Committee with full support from the MarketMaker network of state program coordinators. Whether or not that committee will have the capacity within itself to manage a full or partial-scale implementation is an open question. However, this committee should be charged with the responsibility of assessing what scale of implementation is necessary and to recommend approaches. This committee should work closely with the MM Policy Advisory Committee to generate whatever resources are necessary for implementation of the selected evaluation procedure. Finally, it should be recognized that program evaluation can be a powerful tool to help guide program development and adequate resources should be maintained to support this function.

VIII. Appendices

Appendix One – MarketMaker Logic Models

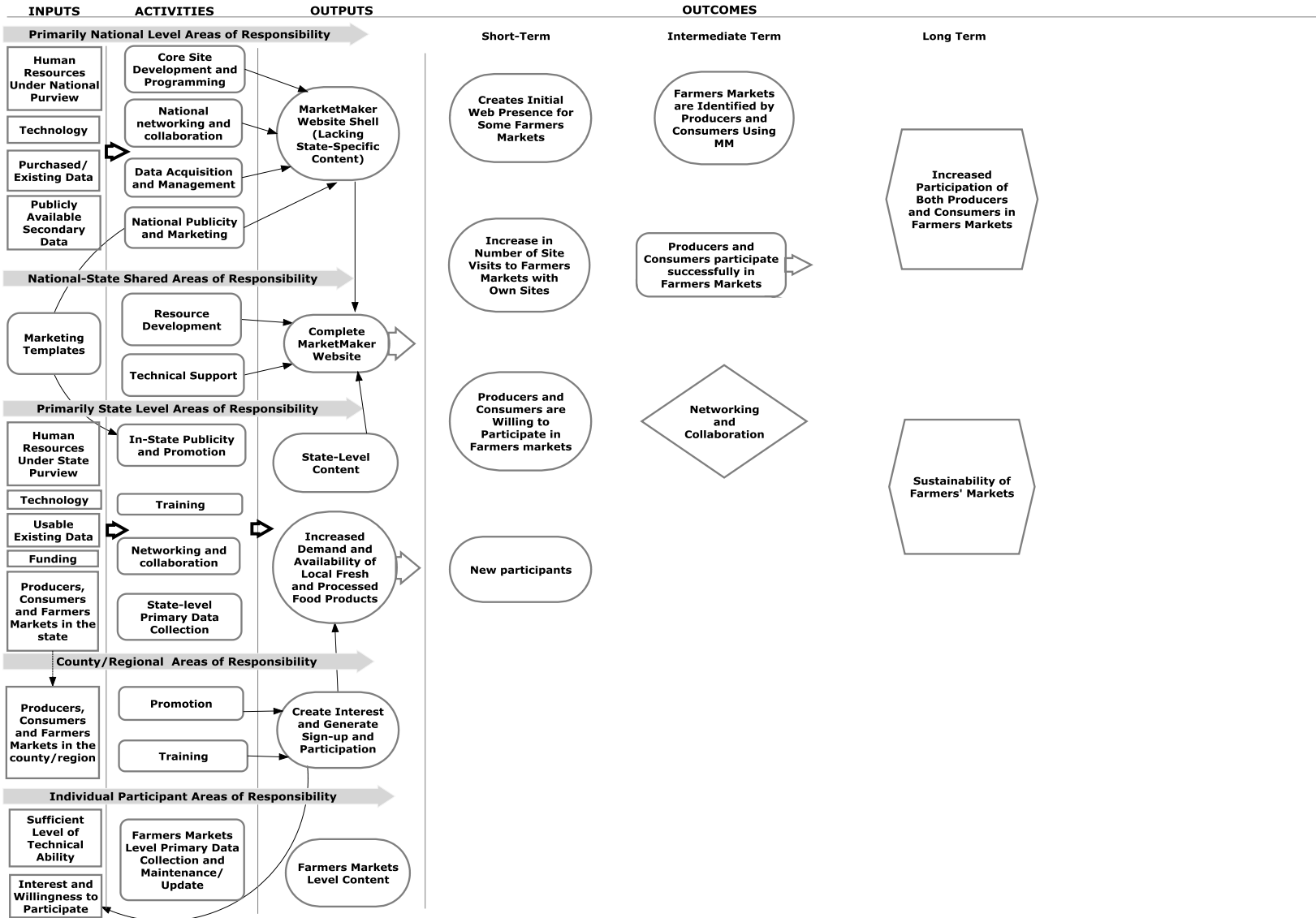
Appendix 1.1 MarketMaker Logic Model for Farmers and Fishermen (Producers)

MarketMaker Producer Logic Model



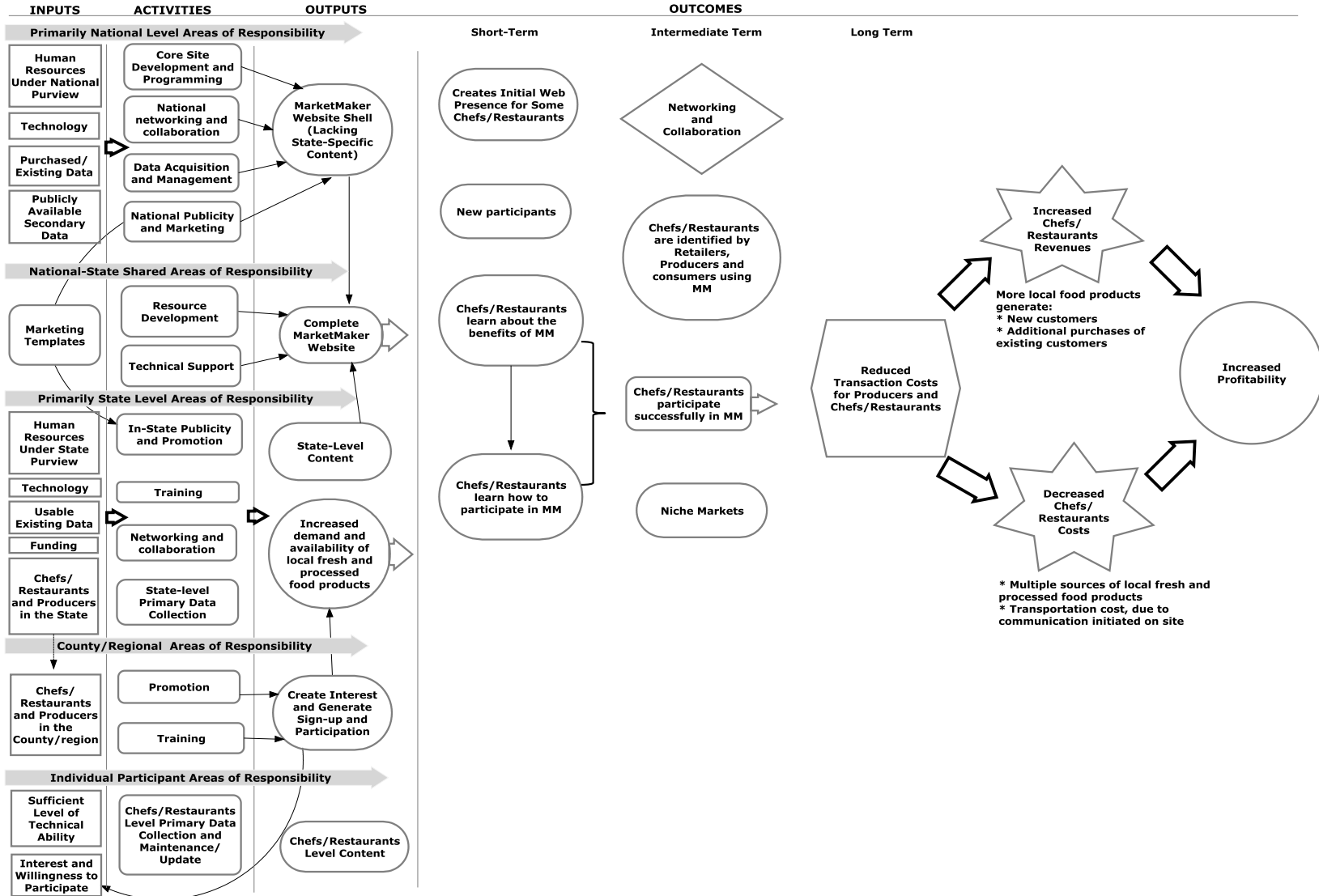
Appendix 1.2 MarketMaker Logic Model for Farmers Markets.

MarketMaker Farmers Markets Logic Model



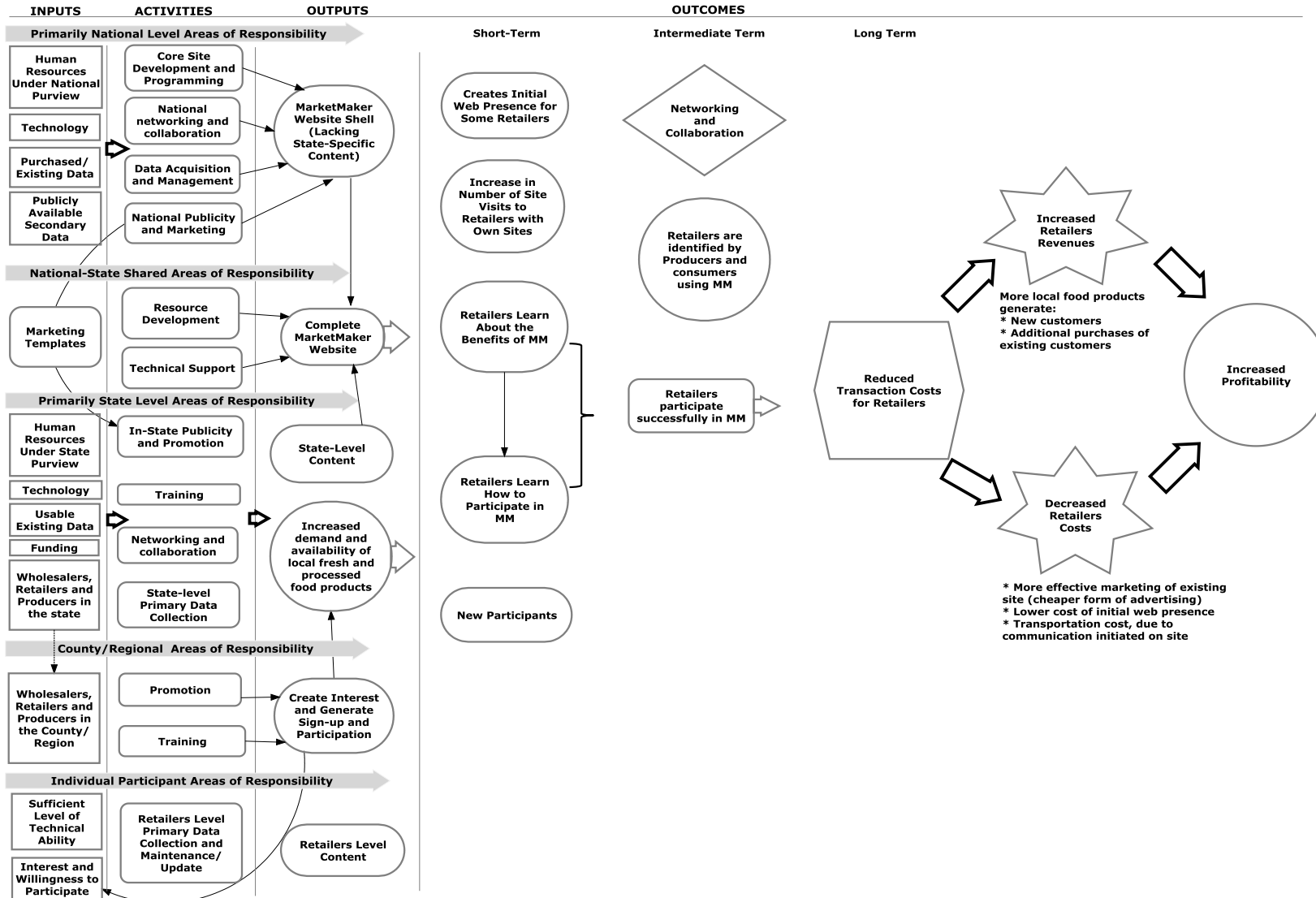
Appendix 1.3 MarketMaker Logic Model for Chefs/Restaurants.

MarketMaker Chefs/Restaurants Logic Model



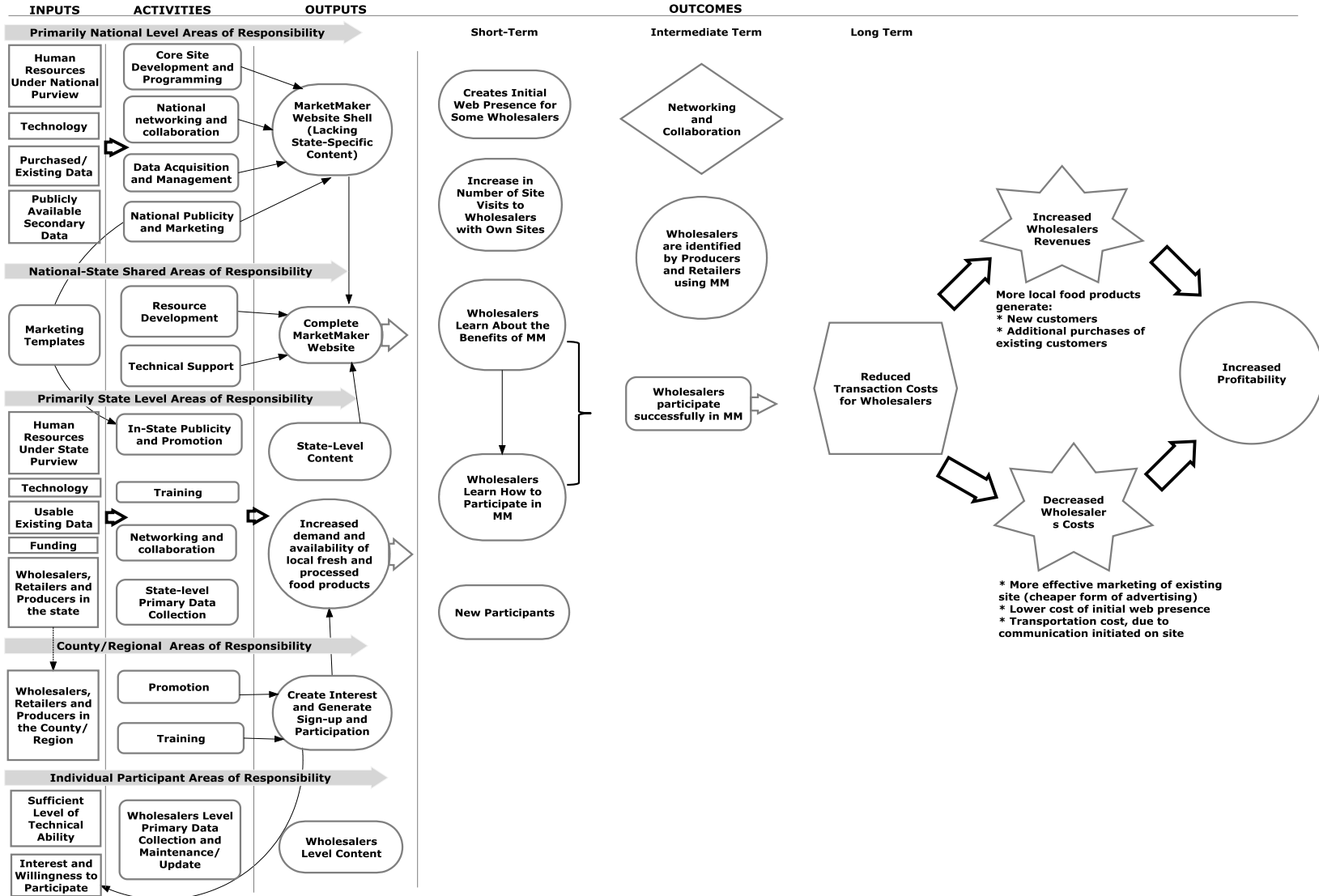
Appendix 1.4 MarketMaker Logic Model for Retailers.

MarketMaker Retailers Logic Model



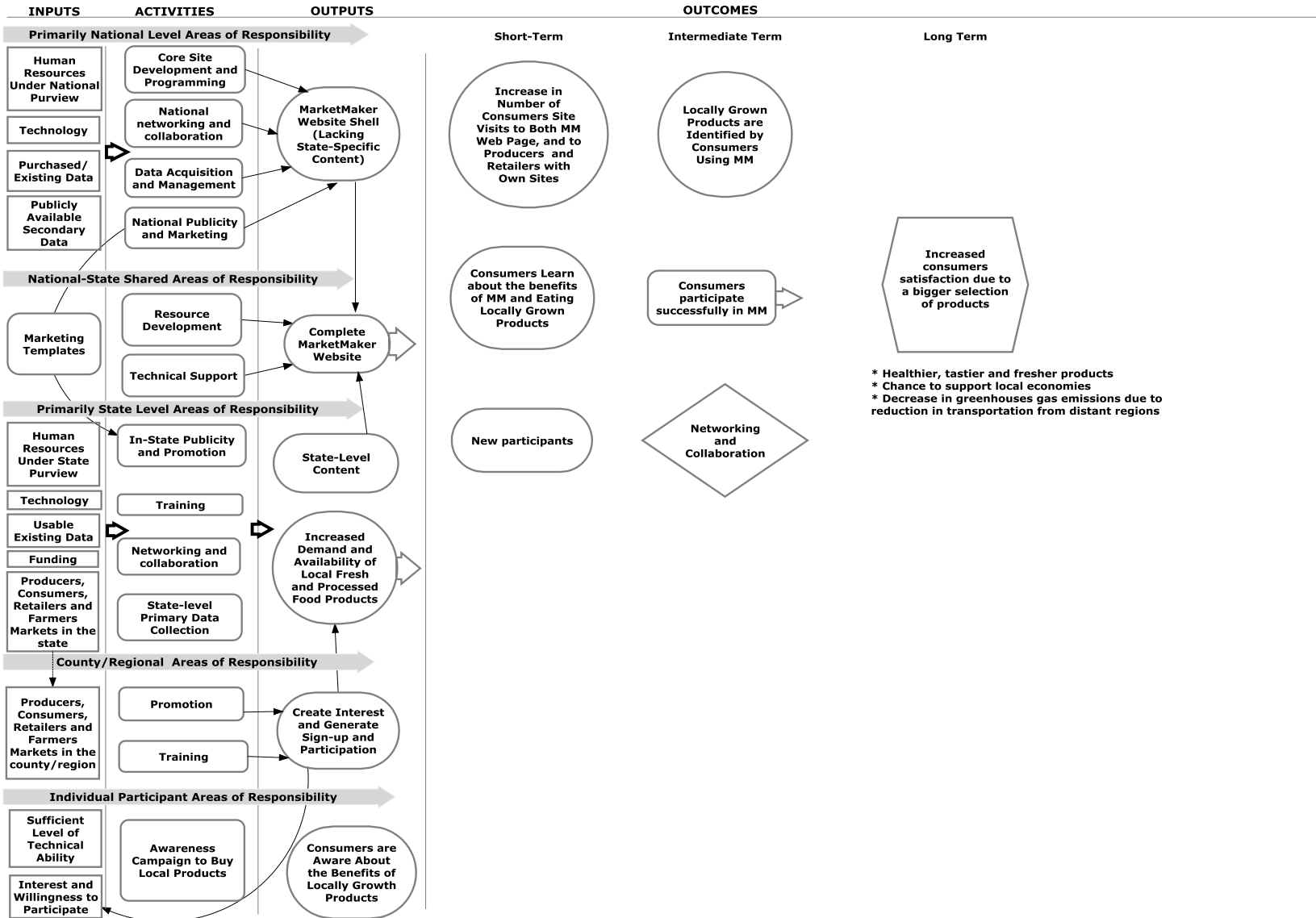
Appendix 1.5 MarketMaker Logic Model for Wholesalers.

MarketMaker Wholesalers Logic Model



Appendix 1.6 MarketMaker Logic Model for Consumers.

MarketMaker Consumer Logic Model



Appendix Two – Survey Instruments

Appendix 2.1 Proposed Survey for Producers Using MarketMaker

You are invited to participate in a research study evaluating the electronic food marketing network MarketMaker and its capacity to improve efficient market access for farmers and food entrepreneurs. The main purpose of this survey is to quantify the impact of Market Maker.

The research study is being conducted by a team of researchers from Clemson University led by Dr R David Lamie. Please be assured that your participation in this survey will remain confidential and will not be used for further solicitation purposes.

Please take a few minutes to complete the following survey. Your responses are very important to us, thank you in advance for your time.

I accept the above conditions and understand that my participation will not harm or benefit me.

I decline participation and understand that my participation will not affect or benefit me.

The questions in Section 1 describe the nature of your business.

1. What are the primary products that you produce? (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Dry beans and peas | <input type="checkbox"/> Poultry and eggs |
| <input type="checkbox"/> Fruits | <input type="checkbox"/> Dairy |
| <input type="checkbox"/> Nursery, greenhouse, and floriculture | <input type="checkbox"/> Fish, seafood and aquaculture |
| <input type="checkbox"/> Field crops | <input type="checkbox"/> Wine |
| <input type="checkbox"/> Nuts | <input type="checkbox"/> Herbs |
| <input type="checkbox"/> Vegetables | <input type="checkbox"/> Value-added (Processed or prepared) products |
| <input type="checkbox"/> Cattle and calves | <input type="checkbox"/> Other, specified |
| <input type="checkbox"/> Hogs and pigs | _____ |
| <input type="checkbox"/> Sheep and lamb | |

2. What forms of marketing and distribution does your business use to sell products to consumers? (check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Farmers Markets/Road stands | <input type="checkbox"/> Sales to Schools and Institutions |
| <input type="checkbox"/> On-farm sales/Agritourism | <input type="checkbox"/> Mail order |
| <input type="checkbox"/> Sales to retailers | <input type="checkbox"/> Internet sales |
| <input type="checkbox"/> Sales to wholesalers | <input type="checkbox"/> Other, specified |
| <input type="checkbox"/> Sales to restaurants | _____ |

3. Does your business have a website?

- Yes No

4. Are any questions in Section 1 confusing? If yes, what comments or suggestions do you have to help clarify the questions?

The questions in Section 2 apply to your experiences with MarketMaker.

1. How did you initially become aware of the MarketMaker website?
- | | |
|--|---|
| <input type="checkbox"/> Extension program | <input type="checkbox"/> Other producer |
| <input type="checkbox"/> Word-of-mouth | <input type="checkbox"/> MarketMaker training session |
| <input type="checkbox"/> Link from your state
Department of Agriculture website | _____ |
| <input type="checkbox"/> Link from other website | <input type="checkbox"/> Other, specified |
| _____ | _____ |

2. How long have you been registered on the MarketMaker website?
- | | |
|--|--|
| <input type="checkbox"/> Less than a month | <input type="checkbox"/> Between 3 and 4 years |
| <input type="checkbox"/> 1 to 6 months | <input type="checkbox"/> More than 4 years |
| <input type="checkbox"/> 7 months to a year | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> Between 1 and 2 years | |

3. How often do you use the following features of the MarketMaker website?

	Never	Rarely	Sometimes	Frequently
Log on to check/update profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for related products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for new collaborators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for any sales prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Find a target market for your products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Buy/Sell Forum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. What is the average time per month spent on any activities associated with MarketMaker?
- Less than 30 minutes
 - 30 to 60 minutes
 - 1 to 2 hours
 - 3 to 5 hours
 - 6 to 10 hours
 - More than 10 hours

5. Was MarketMaker your initial on-line farm directory or marketing website? (including your own website)

Yes No

6. Please specify the other farm directory or marketing websites with which your business is registered. (Check all that apply)

- Local Harvest - <http://www.localharvest.org/>
- Farm Locator - <http://www.newfarm.org/farmlocator/index.php>

- Eat Well Guide - <http://www.eatwellguide.org>
- Rural Bounty - <http://www.ruralbounty.com/>
- Local Farm Link - <http://localfarmlink.com>
- Chef Collaborative - <http://guide.chefscollaborative.org/>
- Agricultural Business - <http://agrinet.tamu.edu/agbus/home.htm>
- Green People - <http://www.greenpeople.org/>
- Eat Wild, Grass-Fed Food - <http://www.eatwild.com/products/index.html>
- Family Farmed - <http://www.familyfarmed.org/>
- Pick Your Own - <http://www.pickyourown.org/>
- State locally growth campaign website
- Farm Bureau
- Local Food directory for my city/county
- Other, specified _____
- Not registered with other websites

7. On a scale of 1 to 4 (1 being poor and 4 being excellent), please rate the quality of the following attributes based on your experiences with the farm directories or marketing websites. If you have not used a particular site, please leave the response blank. If you would like to mention additional attributes about one of the listed farm directories or marketing websites, please place an x in the Other category.

Farm directory or marketing websites	Easy to Use	Security (Trust)	Reliable Information	Useful Features	Other, specify
MarketMaker					
Local Harvest					
Farm Locator					
Eat Well Guide					
Rural Bounty					
Local Farm Link					
Chef Collaborative					
Agricultural Business					
Green People					
Eat Wild, Grass-Fed Food					
Family Farmed					
Pick Your Own					
State locally growth campaign website					
Farm Bureau					
Local Food directory for my city/county					
Other:					

What additional attributes would you like to mention about the wholesaler/food distributor directory or marketing websites where you placed an X in the Other category?

8. Are any questions in Section 2 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 3 relate to the size and structure of your business.

1. Please describe the size of your business (acres owned and rented) during the most recent full calendar year:
 - Under 10 acres
 - 10 to 49 acres
 - 50 to 99 acres
 - 100 to 179 acres
 - 180 to 259 acres
 - 270 to 499 acres
 - 500 to 999 acres
 - 1,000 to 1,999 acres
 - 2,000 acres and over

2. Please describe the size of your business in terms of total sales for the most recent full calendar year?
 - Less than \$ 10,000
 - \$ 10,000 to \$ 49,999
 - \$ 50,000 to \$ 99,999
 - \$ 100,000 to \$ 249,000
 - \$ 250,000 to \$ 499,000
 - \$ 500,000 and over

3. What do you think is the percentage of your costs of production and marketing relative to the level of your company's sales (e.g., for every \$100 in sales, my costs of production and marketing are \$50 or 50%). (choices available in drop list)
 - Less than 19%
 - 20% to 39%
 - 40% to 59%
 - 60% to 79%
 - 80% to 100%
 - More than 100%

4. Are any questions in Section 3 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 4 refer to your perceptions regarding possible outcomes of your participation with MarketMaker over the entire period of time since you became registered on this website.

1. What percentage increase in traffic to your business website have you experienced due to participation with MarketMaker?
 - Less than 10%
 - 10% to 19%
 - 20% to 29%
 - 30% to 39%
 - 40% to 49%
 - 50% to 59%
 - 60% to 69%
 - 70% to 79%
 - 80% to 89%
 - 90% or greater
 - Not Sure
 - Does not apply

2. Approximately, how many additional marketing contacts do you think were developed due to your participation with MarketMaker?
 - No new contacts
 - Less than 10
 - 11 to 20
 - 21 to 30
 - 31 to 40
 - 41 to 50
 - More than 50

3. Approximately, how many potential business partners have you contacted through the MarketMaker directory (e.g., input suppliers or marketing partners)?
 - No new business partners
 - Less than 5
 - 6 to 10
 - 11 to 20
 - More than 20

4. How many new customers do you think you have gained due to your membership with MarketMaker?
 - No new customers
 - Less than 5
 - 6 to 10
 - 11 to 20
 - More than 20

5. How many professional relationships do you think you have formed with other producers due to your membership with MarketMaker?
- No new professional relationships
 - Less than 5
 - 6 to 10
 - 11 to 20
 - More than 20
6. What do you think is the approximate dollar value of your business sales generated or assisted by MarketMaker?
- Under \$25
 - \$25 to \$50
 - \$51 to \$75
 - \$76 to \$99
 - \$100 to \$499
 - \$500 to \$999
 - \$1,000 to \$4,999
 - \$5,000 to \$9,999
 - \$10,000 or more
7. Has participation in MarketMaker enabled you to establish new or additional contract sales for any of your products?
- Yes No
8. How do you think the variability of your year to year farm income has changed due to your participation with MarketMaker?
- Increase Decrease Unchanged Don't know
9. How do you think participation with MarketMaker has affected the distribution of your products through alternative marketing channels?
- Increase Decrease Unchanged Don't know

Please indicate which of the following alternative marketing channel you are used more/less due to participation with MarketMaker:

- Farmers Markets/Road stands
- On-farm sales/Agritourism
- Sales to retailers
- Sales to wholesalers
- Sales to restaurants
- Sales to Schools and Institutions
- Mail order

- Internet sales
- Other: _____

10. Do you think participation with MarketMaker allowed you to change average prices per unit that you are able to charge for your products?

- Yes, increased certain product prices
- Yes, decreased certain product prices
- No, product prices have not changed
- Don't know

Approximately, what is the percentage increase/decrease in average price per unit that your business is able to charge for your products?

(Choices available in drop list)

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

11. Do you think participation with MarketMaker has contributed to the change in the quantities of products that your business sells annually?

- Yes, quantity of annually product sales have increased
- Yes, quantity of annually product sales have decreased
- No, quantity of annually product sales have not changed
- Don't know

Approximately, what is the percentage increase/decrease in the quantities of products that your business sells annually?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

12. Do you think participation with MarketMaker affected your average costs of production and marketing per unit?

- Yes, average costs have increased
- Yes, average costs have decreased
- No, average costs have not changed
- Don't know

Approximately, what is the percentage increase/decrease in your average costs of production and marketing per unit?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

13. How has the size of your operation in terms of production changed since your participation with MarketMaker?

- Increased
- Decreased
- Unchanged
- Don't know

Approximately, what is the percentage increase/decrease in the size of your operation in terms of production changed since your participation with MarketMaker?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

14. How do you think your annual profitability changed due to participation with MarketMaker?

- Increased
- Decreased
- Not changed
- Don't know

Approximately, what is the percentage increase/decrease in your business's annual profitability?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

15. Since its creation in 2000, MarketMaker has offered its electronic infrastructure and resources to consumers, farmers, processors, retailers, chefs/restaurants, farmer markets, and so on at no cost. Currently, MarketMaker is entirely funded by federal and state government institutions, but may become a privately funded organization in the future. If MarketMaker becomes privately funded, while retaining all the features and services it currently provides, would you be willing to pay an annual participation fee of \$X for the services you receive from MarketMaker?

Yes

No

Initial annual participation fees (X) will be \$25, 50, 75, 100, 150, and 200.

Would you be willing to pay an annual participation fee of $\$X \pm Y$ for the services you receive from MarketMaker?

Yes

No

Follow-up annual participation fees ($X \pm Y$) will be \$15, 25, 50, 75, 100, and 150 when the initial response is a "no", and \$50, 75, 100, 150, 200, and 250 when the initial response is a "yes".

16. Are any questions in Section 4 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 5 are demographic questions.

1. Please provide the zip code where your farm/business is located:

Zip code: _____

2. What is the highest level of education you have completed?

- Some High School
- High School Diploma/ GED
- Some College
- Associates Degree
- Bachelor's Degree
- Graduate Degree

3. What is your gender?

- Male Female

4. What is your ethnicity?

- White, Non Hispanic
- Black/ African-American
- Hispanic/ Latino
- Native American/ American Indian
- Asian/ Pacific Islander
- Other: _____

5. What is your age?

- | | |
|-----------------------------------|---------------------------------------|
| <input type="checkbox"/> 19 to 24 | <input type="checkbox"/> 55 to 64 |
| <input type="checkbox"/> 25 to 34 | <input type="checkbox"/> 65 to 74 |
| <input type="checkbox"/> 35 to 44 | <input type="checkbox"/> 75 and older |
| <input type="checkbox"/> 45 to 54 | |

6. What was the annual average amount of your family's off-farm income over the last 5 years?
- Less than \$ 10,000
 - \$ 10,000 to \$ 49,999
 - \$ 50,000 to \$ 99,999
 - \$ 100,000 to \$ 249,000
 - \$ 250,000 to \$ 499,000
 - \$ 500,000 and over
7. How many events organized by your state's extension service have you attended during the last year?
- None
 - Less than 3
 - 3 to 6
 - 7 to 10
 - More than 10
8. Please indicate which of the following internet access points you regularly use to log on MarketMaker:
- Home computer
 - Farm's computer
 - Public library computer or Wi-Fi
 - Community center computer or Wi-Fi
 - Wi-Fi coffee shop
 - Smartphone
 - Other, specify _____
9. Please characterize the internet connection you use regularly to log on MarketMaker:
- Dial-up – toll free
 - Dial-up – toll call
 - Broadband - wireless
 - Broadband – modern cable
 - Broadband – Direct Service Line (DSL)
 - Broadband - fiber
 - Broadband – T-1
 - Unsure
 - Other, specify _____
10. Are any questions in Section 5 confusing? If yes, what comments or suggestions do you have to help clarify the question?

Appendix 2.2 Proposed Survey for Farmer Markets Using MarketMaker

You are invited to participate in a research study evaluating the electronic food marketing network MarketMaker and its capacity to improve efficient market access for farmers and food entrepreneurs. The main purpose of this survey is to quantify the impact of Market Maker.

The research study is being conducted by a team of researchers from Clemson University led by Dr R David Lamie. Please be assured that your participation in this survey will remain confidential and will not be used for further solicitation purposes.

Please take a few minutes to complete the following survey. Your responses are very important to us, thank you in advance for your time.

I accept the above conditions and understand that my participation will not harm or benefit me.

I decline participation and understand that my participation will not affect or benefit me.

The questions in Section 1 describe the nature of your business.

1. How long have your Farmers Market been in operation?
 - Less than 2 years
 - 2 – 3 years
 - 4 - 9 years
 - 10 - 15 years
 - More than 15 years
2. Please provide the zip code where your Farmers Market is located:
Zip code: _____
3. How would you best describe the size of your Farmers Market in terms of the number of vendors during the most recent full calendar year?
 - Less than 10
 - 11-25 vendors
 - 26-50 vendors
 - 51-75 vendors
 - 76-100
 - More than 100 vendors
4. How would you best describe the size of your Farmers Market in terms of total sales during the most recent full calendar year?
 - Less than \$ 10,000
 - \$ 10,000 to \$ 49,999
 - \$ 50,000 to \$ 99,999
 - \$ 100,000 to \$ 249,000
 - \$ 250,000 to \$ 499,000
 - \$ 500,000 and over
5. What were the average costs of operation of your Farmers Market during the most recent full calendar year?
6. How would you best describe the time of operation of your Farmers Market?
 - Daily
 - Two to three times a week
 - Once a week
 - Two to four months a year
 - Five to eight months a year
 - All year long
7. How would you best describe the vendors that sell at your Farmers Market?
 - Local Farmers
 - Out-of-State Farmers
 - Re-sellers
8. Did your Farmers Market have its own website prior to registering with Market Maker?
 - Yes
 - No

Are any questions in Section 1 confusing? If yes, what comments or suggestions do you have to help clarify the questions?

The questions in Section 2 apply to your experiences with MarketMaker.

1. How did you initially become aware of the MarketMaker website?
- | | |
|--|---|
| <input type="checkbox"/> Extension program | <input type="checkbox"/> Other producer |
| <input type="checkbox"/> Word-of-mouth | <input type="checkbox"/> MarketMaker training session |
| <input type="checkbox"/> Link from your state | <input type="checkbox"/> Other, specified _____ |
| Department of Agriculture website | |
| <input type="checkbox"/> Link from other website | |

2. How long have you been registered on the MarketMaker website?
- | | |
|--|--|
| <input type="checkbox"/> Less than a month | <input type="checkbox"/> Between 3 and 4 years |
| <input type="checkbox"/> 1 to 6 months | <input type="checkbox"/> More than 4 years |
| <input type="checkbox"/> 7 months to a year | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> Between 1 and 2 years | |

3. How often do you use the following features of the MarketMaker website?

	Never	Rarely	Sometimes	Frequently
Log on to check/update profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for related products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for new vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reach out to customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. What is the average time per month spent on any activities associated with MarketMaker?

- Less than 30 minutes
- 30 to 60 minutes
- 1 to 2 hours
- 3 to 5 hours
- 6 to 10 hours
- More than 10 hours

5. Please specify the other farm directory or marketing websites with which you have registered your Farmer's Market. (Check all that apply)

- Local Harvest - <http://www.localharvest.org/>
- Farm Locator - <http://www.newfarm.org/farmlocator/index.php>
- Eat Well Guide - <http://www.eatwellguide.org>
- Rural Bounty - <http://www.ruralbounty.com/>
- Local Farm Link - <http://localfarmlink.com>
- Chef Collaborative - <http://guide.chefscollaborative.org/>
- Agricultural Business - <http://agrinet.tamu.edu/agbus/home.htm>
- Green People - <http://www.greenpeople.org/>
- Eat Wild, Grass-Fed Food - <http://www.eatwild.com/products/index.html>

- Family Farmed - <http://www.familyfarmed.org/>
- Pick Your Own - <http://www.pickyourown.org/>
- State locally growth campaign website
- Farm Bureau
- Local Food directory for my city/county
- Other, specified _____

6. Please rate the quality of the following attributes in the farm directory or marketing websites that you have used (1 if poor and 4 if excellent). If you have not used a particular site, please leave it blank.

Farm directory or marketing websites	Easy to Use	Security (Trust)	Reliable Information	Useful Features	Other, specify
MarketMaker					
Local Harvest					
Farm Locator					
Eat Well Guide					
Rural Bounty					
Local Farm Link					
Chef Collaborative					
Agricultural Business					
Green People					
Eat Wild, Grass-Fed Food					
Family Farmed					
Pick Your Own					
State locally growth campaign website					
Farm Bureau					
Local Food directory for my city/county					
Other:					

7. Are any questions in Section 2 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 4 refer to your perceptions regarding possible outcomes of your participation with MarketMaker over the entire period of time since you became registered on this website.

1. How many **contacts** do you think have been made with your Farmers Market due to its participations with MarketMaker?

- None
- Less than 5
- 6 to 10
- 11 to 20
- More than 20

2. What percentage increase in the **number of vendors** at your Farmer's Market have you experienced due to participation with MarketMaker?

- No increase
- Less than 10%
- 10% to 19%
- 20% to 29%
- 30% to 39%
- 40% to 49%
- 50% to 59%
- 60% to 69%
- 70% to 79%
- 80% to 89%
- 90% or greater
- Not Sure
- Does not apply

3. What percentage increase in the **total sales** at your Farmers Market have you experienced due to participation with MarketMaker?

- No increase
- Less than 10%
- 10% to 19%
- 20% to 29%
- 30% to 39%
- 40% to 49%
- 50% to 59%
- 60% to 69%
- 70% to 79%
- 80% to 89%
- 90% or greater
- Not Sure
- Does not apply

4. How do you think the **variability** of the total sales was affected by to your participation with MarketMaker?

- Increased Decreased Didn't Change Don't know

5. How many new customers do you think your Farmers Market have gained due to your membership with MarketMaker?

- None
 Less than 10
 11 to 25
 25 to 50
 50 to 100
 101 to 200
 More than 200

6. How many relationships do you think you have formed with other Farmers Markets or other organizations due to your membership with MarketMaker?

- None
 Less than 5
 6 to 10
 11 to 20
 More than 20

7. How do you think the composition of your vendors was affected by your participation with MarketMaker?

- Increased Decreased Unchanged Don't know

8. Do you think participation with MarketMaker allowed your vendors to change average prices per unit that they were able to receive for their products?

- Increased prices in some cases No change in prices
 Decreased prices in some cases Don't know

Approximately, what is the percentage increase/decrease in average prices per unit?

(Choices available in drop list)

- Less than 5%
 6% to 10%
 11% to 20%
 More than 20% percent

9. Do you think participation with MarketMaker allowed your vendors to change quantities of products that they were able to sell annually?

- Quantities have increased Quantities have not changed
 Quantities have decreased Don't know

Approximately, what is the percentage increase/decrease of annual quantity sold?

- Less than 5%
 6% to 10%
 11% to 20%
 More than 20% percent

10. Do you think participation with MarketMaker affected the average costs of operation of your Farmers Market?

- Costs have increased Costs have not changed
 Costs have decreased Don't know

Approximately, what is the percentage increase/decrease of your average costs of operation?

- Less than 5%
 6% to 10%
 11% to 20%
 More than 20% percent

11. Since its creation in 2000, MarketMaker has offered its electronic infrastructure and resources to consumers, farmers, processors, retailers, chefs/restaurants, farmer markets, and so on at no cost. Currently, MarketMaker is entirely funded by federal and state government institutions, but may become a privately funded organization in the future. If MarketMaker becomes privately funded, while retaining all the features and services it currently provides, would you be willing to pay an annual participation fee of \$X for the services you receive from MarketMaker?

Yes

No

Initial annual participation fees (X) will be \$25, 50, 75, 100, 150, and 200.

Would you be willing to pay an annual participation fee of \$X±Y for the services you receive from MarketMaker?

Yes

No

Follow-up annual participation fees (X±Y) will be \$15, 25, 50, 75, 100, and 150 when the initial response is a “no”, and \$50, 75, 100, 150, 200, and 250 when the initial response is a “yes”.

12. Are any questions in Section 4 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 5 are demographic questions describing the Farmers' Market manager.

1. What is the highest level of education you have completed?

- Some High School
- High School Diploma/ GED
- Some College
- Associates Degree
- Bachelor's Degree
- Graduate Degree

2. What is your gender?

- Male
- Female

3. What is your ethnicity?

- White, Non Hispanic
- Black/ African-American
- Hispanic/ Latino
- Native American/ American Indian
- Asian/ Pacific Islander
- Other: _____

4. What is your age?

- 19 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 and older

5. How many events organized by your state's extension service have you attended during the last year?

- None
- Less than 3
- 3 to 6
- 7 to 10
- More than 10

6. Please indicate which of the following internet access points you regularly use to log on to MarketMaker:

- Home computer
- Work computer
- Public library Computer or Wi-Fi
- Community center computer or Wi-Fi
- Coffee shop Wi-Fi
- Smartphone
- Other, specify _____

7. Please characterize the internet connection you use most frequently to log on to MarketMaker:

- Dial-up – toll free
- Dial-up – toll call
- Broadband - wireless
- Broadband – modern cable
- Broadband – Direct Service Line (DSL)
- Broadband - fiber
- Broadband – T-1
- Unsure
- Other, specify _____

8. Are any questions in Section 5 confusing? If yes, what comments or suggestions do you have to help clarify the question?

Appendix 2.3 Proposed Survey for Wholesalers Using MarketMaker

You are invited to participate in a research study evaluating the electronic food marketing network MarketMaker and its capacity to improve efficient market access for farmers and food entrepreneurs. The main purpose of this survey is to quantify the impact of Market Maker.

The research study is being conducted by a team of researchers from Clemson University led by Dr R David Lamie. Please be assured that your participation in this survey will remain confidential and will not be used for further solicitation purposes.

Please take a few minutes to complete the following survey. Your responses are very important to us, thank you in advance for your time.

- I accept the above conditions and understand that my participation will not harm or benefit me.
- I decline participation and understand that my participation will not affect or benefit me.

The questions in Section 1 describe the nature of your business.

1. Job Title (check one)

- Owner/CEO/President
- Manager
- Sales/Marketing
- Buyer
- VP/GM/Director
- Merchandiser
- Other: _____

2. What are the primary types of food products that you buy and sell? (Check all that apply)

- Dairy Products
- Package Frozen Food
- Meat and Meat Products
- Fish and Seafood
- Fresh Fruit and Vegetables
- Processed Fruits and Vegetables
- Grains
- Other, specified _____

3. What forms of marketing and distribution does your business use to sell products to consumers? (check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Farmers Markets/Road stands | <input type="checkbox"/> Sales to Schools and Institutions |
| <input type="checkbox"/> On-farm sales/Agritourism | <input type="checkbox"/> Mail order |
| <input type="checkbox"/> Sales to retailers | <input type="checkbox"/> Internet sales |
| <input type="checkbox"/> Sales to wholesalers | <input type="checkbox"/> Other, specified _____ |
| <input type="checkbox"/> Sales to restaurants | |

4. Does your business have a website?

- Yes No

5. Are any questions in Section 1 confusing? If yes, what comments or suggestions do you have to help clarify the questions?

The questions in Section 2 apply to your experiences with MarketMaker.

1. How did you initially become aware of the MarketMaker website?
- | | |
|--|---|
| <input type="checkbox"/> Extension program | <input type="checkbox"/> Other business |
| <input type="checkbox"/> Word-of-mouth | <input type="checkbox"/> MarketMaker training session |
| <input type="checkbox"/> Link from your state | <input type="checkbox"/> Other, specified _____ |
| Department of Agriculture website | |
| <input type="checkbox"/> Link from other website | |

2. How long have you been registered on the MarketMaker website?
- | | |
|--|--|
| <input type="checkbox"/> Less than a month | <input type="checkbox"/> Between 3 and 4 years |
| <input type="checkbox"/> 1 to 6 months | <input type="checkbox"/> More than 4 years |
| <input type="checkbox"/> 7 months to a year | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> Between 1 and 2 years | |

3. How often do you (and/or other members of your company) use the following features of the MarketMaker website?

	Never	Rarely	Sometimes	Frequently
Log on to check/update profile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for related products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for new collaborators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Search for any sales prospects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Find a target market for your products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use the Buy/Sell Forum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. What is the average time per month spent on any activities associated with MarketMaker?

- Less than 30 minutes
- 30 to 60 minutes
- 1 to 2 hours
- 3 to 5 hours
- 6 to 10 hours
- More than 10 hours

5. Was MarketMaker your initial on-line wholesaler/food distributor directory or marketing website? (including your own website)

- Yes No

6. Please specify the other wholesaler/food distributor directory or marketing websites with which you have registered your business. (Check all that apply)

- Food and Beverage Online - http:
- FoodForSale - http://
- DollarDay\$Alibaba - http://
- Wholesale_suppliers.net - http://
- Usawholesalers - http://
- Bulkfoods - http://
- Efooddepot - http://
- Not registered with other websites
- Other, specified _____

7. On a scale of 1 to 4 (1 being poor and 4 being excellent), please rate the quality of the following attributes based on your experiences with the wholesaler/food distributor directory or marketing websites. If you have not used a particular site, please leave it blank. If you would like to mention additional attributes about one of the listed wholesaler/food distributor directory or marketing websites, please place an X in the Other category.

Wholesaler/food distributor directory or marketing websites	Easy to Use	Security (Trust)	Reliable Information	Useful Features	Other
MarketMaker					
Food and Beverage Online					
FoodForSale					
DollarDay\$Alibaba					
Wholesale_suppliers.net					
Usawholesalers					
Bulkfoods					
Efooddepot					
Other: _____					

What additional attributes would you like to mention about the wholesaler/food distributor directory or marketing websites where you placed an X in the Other category?

8. Are any questions in Section 2 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 3 relate to the size and structure of your business.

1. Please describe the size of your business (number of employees) during the most recent full calendar year:
 - Under 100 employees
 - 100 to 199 employees
 - 200 to 499 employees
 - 500 to 1,000 employees
 - More than 1,000 employees

2. Please describe the size of your business in terms of total sales for the most recent full calendar year?
 - Less than \$ 1 million
 - \$ 1 million to \$ 5 million
 - \$ 5 million to \$ 10 million
 - \$ 10 million to \$ 50 million
 - More than \$ 50 million

3. What do you think is the percentage of your costs of production and marketing relative to the level of your company's sales (e.g., for every \$100 in sales, my costs of production and marketing are \$50 or 50%). (choices available in drop list)
 - Less than 19%
 - 20% to 39%
 - 40% to 59%
 - 60% to 79%
 - 80% to 100%
 - More than 100%

4. Are any questions in Section 3 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 4 refer to your perceptions regarding possible outcomes of your participation with MarketMaker over the entire period of time since you became registered on this website.

1. What percentage increase in traffic to your business website have you experienced due to participation with MarketMaker?

- Less than 10%
- 10% to 19%
- 20% to 29%
- 30% to 39%
- 40% to 49%
- 50% to 59%
- 60% to 69%
- 70% to 79%
- 80% to 89%
- 90% or greater
- Not Sure
- Does not apply

2. Approximately, how many additional marketing contacts do you think were developed due to your participation with MarketMaker?

- No new contacts
- Less than 10
- 11 to 20
- 21 to 30
- 31 to 40
- 41 to 50
- More than 50

3. Approximately, how many potential business partners have you contacted through the MarketMaker directory (e.g., input suppliers or marketing partners)?

- None
- Less than 5
- 6 to 10
- 11 to 20
- More than 20

4. How many new buyers do you think you have gained due to your membership with MarketMaker?

- None
- Less than 5
- 6 to 10
- 11 to 20
- More than 20

5. How many professional relationships do you think you have formed with other wholesalers or food distributions due to your membership with MarketMaker?
- None
 - Less than 5
 - 6 to 10
 - 11 to 20
 - More than 20
6. How many new sellers do you think you have gained due to your membership with MarketMaker?
- None
 - Less than 5
 - 6 to 10
 - 11 to 20
 - More than 20
7. What do you think is the approximate dollar value of your business sales generated or assisted by MarketMaker?
- Under \$1,000
 - \$1,000 to \$9,999
 - \$10,000 to \$99,999
 - \$100,000 or more
8. Has participation in MarketMaker enabled you to establish new or additional contract sales for any of your products?
- Yes No
9. How do you think the variability of your year to year business income has changed due to your participation with MarketMaker?
- Increase Decrease Unchanged Don't know
10. How do you think participation with MarketMaker has affected the distribution of your products through alternative marketing channels?
- Increase Decrease Unchanged Don't know

Please indicate which of the following alternative marketing channel you have used more/less due to participation with MarketMaker: (Check all that apply)

- Farmers Markets/Road stands
- On-farm sales/Agritourism
- Sales to retailers
- Sales to wholesalers

- Sales to restaurants
- Sales to Schools and Institutions
- Mail order
- Internet sales
- Other: _____

11. Do you think participation with MarketMaker allowed you to change average prices per unit that you are able to charge for your products?

- Yes, increased prices in some cases
- Yes, decreased prices in some cases
- No, did not change prices
- Don't know

Approximately, what is the percentage increase/decrease in prices per unit that your business is able to charge?

(Choices available in drop list)

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

12. Do you think participation with MarketMaker has contributed to the change in the quantities of products that your business sells annually?

- Yes, quantities have increased
- Yes, quantities have decreased
- No, quantities have not changed
- Don't know

Approximately, what is the percentage increase/decrease in the quantities of products that your business sells annually?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

13. Do you think participation with MarketMaker affected the average price that you paid for the products you purchase?

- Yes, Prices have increased
- Yes, Prices have decreased
- No, Prices have not changed
- Don't know

Approximately, what is the percentage increase/decrease of the average price that you paid for the products you purchase?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

14. How has the size of your operation in terms of production changed since your participation with MarketMaker?

- Increased
- Decreased
- Unchanged

15. How has the time that you spend looking for new buyers and seller changed since your participation with MarketMaker?

- Increased
- Decreased
- Unchanged

16. How do you think your annual profitability changed due to participation with MarketMaker?

- Increased
- Decreased
- Not changed
- Don't know

Approximately, what is the percentage increase/decrease in total profitability?

- Less than 5%
- 6% to 10%
- 11% to 20%
- More than 20% percent

17. Since its creation in 2000, MarketMaker has offered its electronic infrastructure and resources to consumers, farmers, processors, retailers, chefs/restaurants, farmer markets, and so on at no cost. Currently, MarketMaker is entirely funded by federal and state government institutions, but may become a privately funded organization in the future. If MarketMaker becomes privately funded, while retaining all the features and

services it currently provides, would you be willing to pay an annual participation fee of \$X for the services you receive from MarketMaker?

Yes

No

Initial annual participation fees (X) will be \$25, 50, 75, 100, 150, and 200.

Would you be willing to pay an annual participation fee of \$X±Y for the services you receive from MarketMaker?

Yes

No

Follow-up annual participation fees (X±Y) will be \$15, 25, 50, 75, 100, and 150 when the initial response is a “no”, and \$50, 75, 100, 150, 200, and 250 when the initial response is a “yes”.

18. Are any questions in Section 4 confusing? If yes, what comments or suggestions do you have to help clarify the question?

The questions in Section 5 are demographic questions.

1. Please provide the zip code where your farm/business is located:

Zip code: _____

2. What is the highest level of education you have completed?

- Some High School
- High School Diploma/ GED
- Some College
- Associates Degree
- Bachelor's Degree
- Graduate Degree

3. What is your gender?

- Male Female

4. What is your ethnicity?

- White, Non Hispanic
- Black/ African-American
- Hispanic/ Latino
- Native American/ American Indian
- Asian/ Pacific Islander
- Other: _____

5. What is your age?

- | | |
|-----------------------------------|---------------------------------------|
| <input type="checkbox"/> 19 to 24 | <input type="checkbox"/> 55 to 64 |
| <input type="checkbox"/> 25 to 34 | <input type="checkbox"/> 65 to 74 |
| <input type="checkbox"/> 35 to 44 | <input type="checkbox"/> 75 and older |
| <input type="checkbox"/> 45 to 54 | |

6. What was the annual average amount of your family's off-farm income over the last 5 years?

- | | |
|---|---|
| <input type="checkbox"/> Less than \$ 10,000 | <input type="checkbox"/> \$ 100,000 to \$ 249,000 |
| <input type="checkbox"/> \$ 10,000 to \$ 49,999 | <input type="checkbox"/> \$ 250,000 to \$ 499,000 |
| <input type="checkbox"/> \$ 50,000 to \$ 99,999 | <input type="checkbox"/> \$ 500,000 and over |

7. How many events organized by your state's extension service have you attended during the last year?

- None
- Less than 3
- 3 to 6
- 7 to 10
- More than 10

8. Please indicate which of the following internet access points you regularly use to log on MarketMaker:

- Home's computer
- Farm's Computer
- Public library's Computer or Wi-Fi
- Community center' computer or Wi-Fi
- Wi-Fi coffee shop
- Smartphone
- Other, specify _____

9. Please characterize the internet connection you use regularly to log on MarketMaker:

- Dial-up – toll free
- Dial-up – toll call
- Broadband - wireless
- Broadband – modern cable
- Broadband – Direct Service Line (DSL)
- Broadband - fiber
- Broadband – T-1
- Unsure
- Other, specify _____

10. Are any questions in Section 5 confusing? If yes, what comments or suggestions do you have to help clarify the question?

Appendix 2.4 Survey Invitation letters

Initial Email

Email Subject: MarketMaker Survey

Dear MarketMaker user,

You are invited to participate in a research study conducted by a team of researchers from Clemson University led by Dr. R. David Lamie. The purpose of this research is to develop a comprehensive framework and implementation strategy for measuring the impact of the MarketMaker project to improve efficient market access for farmers and food entrepreneurs.

Your participation will involve filling out our short survey regarding your personal perceptions on the contribution of MarketMaker to improve your business performance. The amount of time required for your participation will be approximately 25 minutes.

There are no known risks associated with this research. This research may help us to understand and assess the long-term impact and significant outcomes of MarketMaker for users like you.

The link to the survey is provided below.

[The link to the survey will appear here](#)

Simply click on this address to go directly to the survey. If this does not work, "copy and paste" this address into the address bar of your Internet Browser.

We will do everything we can to protect your privacy. Neither your name nor address will be recorded in association with the survey. Your identity will not be revealed in any publication that might result from this study.

Your participation in this research study is voluntary. You may choose not to participate and you may withdraw your consent to participate at any time. You will not be penalized in any way should you decide not to participate or to withdraw from this study.

If you have any questions or concerns about this study or if any problems arise, please contact R. David Lamie at dlamie@clemson.edu or 803-788-5700 ext 36. If you have any questions or concerns about your rights as a research participant, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-6460 or irb@clemson.edu. If you are outside of the Upstate South Carolina area, please use the ORC's toll-free number, 866-297-3071.

Thank you for your time and input.

Sincerely,

Dr. R. David Lamie
Clemson University

First Reminder Email

Email Subject: MarketMaker Survey Reminder

Dear MarketMaker user,

Recently we sent you a request to participate in a survey about the contribution of MarketMaker to improve your business performance. If you have already filled it out, please accept our thanks.

If you have not completed it yet, please take some time to fill out the questionnaire. This research may help us to understand and assess the long-term impact and significant outcomes of MarketMaker for users like you. The amount of time required for your participation will be approximately 25 minutes.

The link to the survey is provided below.

[The link to the survey will appear here](#)

Simply click on this address to go directly to the survey. If this does not work, "copy and paste" this address into the address bar of your Internet Browser.

We will do everything we can to protect your privacy. Neither your name nor address will be recorded in association with the survey. Your identity will not be revealed in any publication that might result from this study.

Your participation in this research study is voluntary. You may choose not to participate and you may withdraw your consent to participate at any time. You will not be penalized in any way should you decide not to participate or to withdraw from this study.

If you have any questions or concerns about this study or if any problems arise, please contact R. David Lamie at dlamie@clemson.edu or 803-788-5700 ext 36. If you have any questions or concerns about your rights as a research participant, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-6460 or irb@clemson.edu. If you are outside of the Upstate South Carolina area, please use the ORC's toll-free number, 866-297-3071.

Thank you for your time and input.

Sincerely,

Dr. R. David Lamie
Clemson University

Second Reminder Email

Email Subject: MarketMaker Survey Final Reminder

Dear MarketMaker user,

This is a final reminder to request your participation in a survey about the contribution of MarketMaker to improve your business performance. If you have already filled it out, please accept our thanks.

If you have not completed it yet, please take some time to fill out the questionnaire. This research may help us to understand and assess the long-term impact and significant outcomes of MarketMaker for users like you. The amount of time required for your participation will be approximately 25 minutes.

The link to the survey is provided below.

[The link to the survey will appears here](#)

Simply click on this address to go directly to the survey. If this does not work, "copy and paste" this address into the address bar of your Internet Browser.

We will do everything we can to protect your privacy. Neither your name nor address will be recorded in associated with the survey. Your identity will not be revealed in any publication that might result from this study.

Your participation in this research study is voluntary. You may choose not to participate and you may withdraw your consent to participate at any time. You will not be penalized in any way should you decide not to participate or to withdraw from this study.

If you have any questions or concerns about this study or if any problems arise, please contact R. David Lamie at dlamie@clemson.edu or 803-788-5700 ext 36. If you have any questions or concerns about your rights as a research participant, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-6460 or irb@clemson.edu. If you are outside of the Upstate South Carolina area, please use the ORC's toll-free number, 866-297-3071.

Thank you for your time and input.

Sincerely,

Dr. R. David Lamie
Clemson University

Appendix Three - Project Presentation and Publication References

Appendix 3.1. Poster Presented at The National Value-Added Agriculture Conference, 2009.

Evaluating MarketMaker: Analyzing the Impact of an Electronic Food Marketing Network

R. D. Lamie, S. Zapata, O. Isengildina-Massa and C. E. Carpio
 Department of Applied Economics and Statistics, 283 Barre Hall, Clemson University, Clemson, SC 29634.

Introduction

- MarketMaker (MM) is an interactive web-based resource that provides geo-coded food marketing information to food entrepreneurs and customers.
- The project, which was developed by and is administered through the University of Illinois Extension, has grown into a collaborative effort of more than a dozen states' Land Grant Universities and Departments of Agriculture (Figure 1).
- Limited resources have not allowed the MM staff to fully evaluate their program.

Figure 1. National MM State Partners

Methodology

Our research protocol consists of four separate yet inter-related stages:

- Develop a series of logic models to accurately place MM within a context of other necessary inputs and activities intended to achieve intended short, intermediate, and long-term outcomes.
- Develop a comprehensive set of quantifiable evaluation indicators for use in all MM states.
- Conduct a series of focus groups with MM users in order to identify potential barriers to the adoption and use of MM and make appropriate adjustments to the program.
- Combine the results of stages 1, 2, and 3 into a ready-to-use state level MM evaluation plan to allow comparisons across states and aggregation to build national level impact assessments.

Preliminary Results

- To date preliminary results are only available for stage one. Work on stages 2 and 3 is currently under way.
- The first stage of the study included the identification of the main groups of MM participants. As shown in Table 1, MM is actively being used not only by farmers but also by other segments of the food sector.

Table 1. Number of Business Profiles Listed in MM by State and Category, May '09

State	Farm/Food Producers	Food Distributors	Restaurants	Retailers	Total
Georgia	622	11,281	92	22	12,017
Illinois	1,047	43,717	269	49	45,183
Indiana	209	20,762	96	11	21,088
Iowa	874	11,812	94	13	12,693
Kentucky	391	13,971	176	18	14,556
Kyrgyzstan	239	13,891	127	47	14,104
Maine	76	10,633	39	1	10,749
Massachusetts	622	7,182	75	7	8,123
New York	1,319	79,709	464	189	81,681
Ohio	565	10,343	183	42	10,933
South Carolina	322	27,119	79	2	27,522
TN	2	8,197	27	0	8,226
Total	7,451	114,121	1,469	348	116,379

Objectives

- The final goal of our study is the development and implementation of an evaluation protocol that generates information for the assessment of the long term economic impact of MM and its continuous quality improvement. Specific objectives are:
 - Develop a structure and strategy for the ongoing collection of quantitative evaluative information.
 - Develop a set of evaluation tools for state level MM program implementations.
 - Collect qualitative information from current users to complement and inform the quantitative evaluation framework.

Figure 2. MarketMaker Producer Logic Model

Figure 3. MM's Number of Website Hits and Total Users per Month

Discussion and Implications

- The developed sequence of cause-and-effect relationship and logical linkages among program resources, activities, outputs, and outcomes for each MM participant sets the stage for the development of a system of quantifiable indicators, that can be used as evaluation instruments.
- A clear understanding of how MM interacts with their participants will help to identify forces, trends, or activities that may enhance or hinder the effective use of MM.

For more information contact Dr. David Lamie: dlamie@clemson.edu

Support for this research is provided by a grant from the AMM-USDA National State Marketing Improvement Program (NSMIP)

Reference:

Lamie, R. D., S. Zapata, O. Isengildina-Massa, and C. E. Carpio, "Evaluating MarketMaker: Analyzing the Impact of an Electronic Food Marketing Network", Poster Presentation, National Value-Added Agriculture Conference, Moline, IL 1-3 June 2009.

Appendix 3.2 . Poster presented at 2010 Annual Meetings of the Southern Agricultural Economics Association, 2010.

Evaluating MarketMaker: Analyzing the Impact of an Electronic Food Marketing Network

R. D. Lamie, S. Zapata, O. Isengildina-Massa and C. E. Carpio
Department of Applied Economics and Statistics, 283 Barre Hall, Clemson University, Clemson, SC 29634.

Introduction

- MarketMaker (MM) is an interactive web-based resource that provides geo-coded food marketing information to food entrepreneurs and customers.
- The project, which was developed by and is administered through the University of Illinois Extension, has grown into a collaborative effort of more than a dozen states' Land Grant Universities and Departments of Agriculture (Figure 1).
- Limited resources have not allowed the MM staff to fully evaluate their program.

Figure 1. National MM State Partners

Methodology

Our research protocol consists of four separate yet inter-related stages:

- Develop a series of logic models to accurately place MM within a context of other necessary inputs and activities intended to achieve intended short, intermediate, and long-term outcomes.
- Develop a comprehensive set of quantifiable evaluation indicators for use in all MM states.
- Conduct a series of focus groups with MM users in order to identify potential barriers to the adoption and use of MM and make appropriate adjustments to the program.
- Combine the results of stages 1, 2 and 3 into a ready-to-use state level MM evaluation plan to allow comparisons across states and aggregation to build national level impact assessments.

Preliminary Results

- To date results are only available for stages one and two. Work on stages three is currently under way.
- Logic models for producers, consumers, retailers, wholesalers, chefs/restaurants and farmers markets have been developed.
- Figure 2 shows the logic model for producers. This logic model suggests that final outcome of MM use should be an increase in profitability of a producer's operation due to reduction in transaction costs and rise in sales from new and existing customers.
- Based on the logic models, a set of evaluation indicators have been defined (e.g. Table 1). These indicators form the basis for the development of survey instruments for primary data collection.

Table 1. Proposed Metrics for the MM Producer Logic Model

Indicator	Current	Target
Start time when producer participating	Number of new producers registered	
Links with increased through MM	Number of producers with links via producer logic MM	
Additional sales generated through MM	Number of producers with additional sales generated through MM	Change in number of sales or contacts due to MM
Introduction from	Number of new contacts through MM	Number of new contacts during MM (on/off, phone, email, other web)
Number of additional contacts through MM (on/off, email, phone, etc.)	Number of additional contacts through MM (on/off, email, phone, etc.)	Number of CP members due to MM (on/off, phone, email, other web)
Number of additional customers through MM (on/off, email, phone, etc.)	Number of additional customers through MM (on/off, email, phone, etc.)	Number of new orders placed through MM to a farm
Number of new partnerships (retailer and wholesaler)	Number of new partnerships (retailer and wholesaler)	Number of new and old contacts during MM (on/off, phone, email, other web)
Logistics	Number of transactions during MM	Number of new transactions
Increase in revenue (MM? other?)	Change in revenue (MM? other?)	Change in price received, change in volume sold through MM
Change in marketing costs (time and money)	Change in marketing costs (time and money)	Change in time spent marketing products, change in marketing expenditures
Change in the quality and quantity of sales	Change in the quality and quantity of sales	% of sales conducted through MM

Figure 2. MarketMaker Producer Logic Model

Objectives

The final goal of our study is the development and implementation of an evaluation protocol that generates information for the assessment of the long term economic impact of MM and its continuous quality improvement. Specific objectives are:

- Develop a structure and strategy for the ongoing collection of quantitative evaluative information.
- Develop a set of evaluation tools for state level MM program implementations.
- Collect qualitative information from current users to complement and inform the quantitative evaluation framework.

Discussion and Implications

- The developed sequence of cause-and-effect relationship and logical linkages among program resources, activities, outputs, and outcomes for each MM participant sets the stage for the development of a system of quantifiable indicators, that can be used as evaluation instruments.
- A clear understanding of how MM interacts with their participants will help to identify forces, trends, or activities that may enhance or hinder the effective use of MM.

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Support for this research is provided by a grant from the AMS-CSDA Federal/State Marketing Improvement Program (FSMP)

Reference:

Zapata,S., R.D. Lamie, O.Isengildina-Massa, and C. E. Carpio, "Evaluating MarketMaker: Analyzing the Impact of an Electronic Food Marketing Network." Selected Poster 2010 Annual Meetings of the Southern Agricultural Economics Association, Orlando, FL, February 2010.

Appendix 3.3. Research Update to Be Published in the Journal of Food Distribution Research.

Evaluating the Impact of an Electronic Food Marketing Network*

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****Support for this research is provided by a grant from the AMS-USDA Federal/State Marketing Improvement Program (FSMIP)***

Evaluating the Impact of an Electronic Food Marketing Network

Market Maker (MM) is one of the most extensive collections of electronic searchable food industry related data in the United States with over 324,440 profiles of food related enterprises, including more than 6,000 agricultural producers. Initially developed and administered by the University of Illinois Extension Service, MM has grown into a collaborative effort of Land Grant Universities and Departments of Agriculture from more than a dozen states of the country.

The goal of this project is the development of an evaluation protocol that generates information for the assessment of the long term economic impact of MM. Specific objectives are: 1) to develop a structure and strategy for the ongoing collection of quantitative evaluative information, 2) to develop a set of evaluation tools for state level MM program implementations, and 3) to collect qualitative information from current users to complement the quantitative evaluation framework.

METHODS

Our research protocol consists of four separate yet inter-related stages. The first stage involves the development of a series of program logic models for various user groups. In the second stage, we will develop a comprehensive set of quantifiable evaluation indicators. Third, we will conduct a series of focus groups with MM users to gather information regarding their expectations and identify potential barriers to the adoption and use of MM. The final stage will combine the results of stages 1, 2 and 3 into a ready to use state level MM evaluation plan to allow comparisons across states and aggregation to build a national level impact assessment.

PRELIMINARY RESULTS

Logic models have been developed for producers, consumers, retailers, wholesalers, chefs/restaurants and farmer's market participants. For example, the logic model for producers describes the interaction between resources at the national, state and individual level (e.g., human resources at the national and state purview and farmers' technical ability and willingness to participate in MM); activities (e.g., site development and programming); and, outputs (e.g., complete MM website). This logic model also suggests that the final outcome of MM use should be an increase in the profitability of a producer's operation due to the reduction in transaction costs and rise in sales from new and existing customers. Based on the logic models, we are developing primary and secondary data collection protocols and procedures for MM member states to implement in their respective states

Reference:

Zapata, S., R.D. Lamie, C. E. Carpio, and O.Isengildina-Massa. "Evaluating the Impact of an Electronic Food Marketing Network." Research Update. Journal of Food Distribution Research, 41,1(2010):131 (in press).

Appendix 3.4. Research Update Presented at the Food Distribution Research Society Annual Meeting, 2009.

Evaluating the Impact of an Electronic Food Marketing Network

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Support for this research is provided by a grant from the AMS-USDA Federal/State Marketing Improvement Program (FSMIP)

INTRODUCTION

- Several internet-based tools have been developed over the past decade to support local food supply chains.
- MarketMaker (MM) is an interactive web-based resource that provides geo-coded food marketing information to food entrepreneurs and customers.
- MM, which was developed by and is administered through the University of Illinois Extension, has grown into a collaborative effort of more than a dozen states' Land Grant Universities and Departments of Agriculture.

- By August 2009, more than 300 thousand businesses including farmers, processors, distributors and retailers had joined MM.
- Limited resources have not allowed the MM staff to fully evaluate their program.

NATIONAL MARKETMAKER STATE PARTNERS



OBJECTIVES

- The main objective of this research project is the development and implementation of an evaluation protocol that generates information for the assessment of the long term economic impact of MM.
 - Develop a structure and strategy for the ongoing collection of quantitative evaluative information.
 - Develop a set of evaluation tools for state level MM program implementations.
 - Collect qualitative information from current users to complement and inform the quantitative evaluation framework.

METHODOLOGY

- Research protocol consist of four separate yet inter-related stages:
 - Develop a series of logic models to accurately place MM within a context of other necessary inputs and planned activities to achieve intended results.
 - Develop a comprehensive set of quantifiable evaluation indicators.
 - Conduct a series of focus groups with MM users to gather information regarding their expectation and identify potential barriers to the adoption and use of MM.
 - Combine the results of stages 1, 2 and 3 into a ready-to-use state level MM evaluation plan to allow comparisons across states and aggregation to build a national level impact assessments.

PRELIMINARY RESULTS

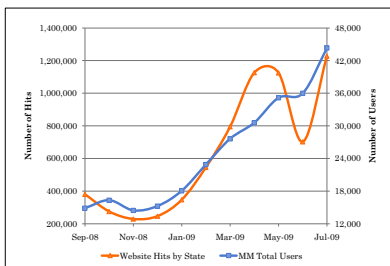
- To date preliminary results are only available for stage one. Work on stages 2 and 3 is currently under way.
- The first stage of the study included the identification of the main groups of MM participants.
- Some evaluation indicators currently collected by MM are the number of business profiles, number of users and number of hits per month.

NUMBER OF BUSINESS PROFILES LISTED IN MARKETMAKER BY STATE AND CATEGORY

State	Type of Business				Total
	Farmers/Producers	State Non-Farm*	Farmers Markets	Wineries	
Arkansas	0	8,813	0	0	8,813
Colorado	343	18,479	112	90	19,024
DC	2	3,026	26	0	3,054
Georgia	455	30,833	105	22	31,415
Illinois	1,070	42,023	263	68	43,424
Indiana	302	15,832	98	12	16,244
Iowa	284	11,455	219	16	11,974
Kentucky	403	12,035	171	16	12,625
Michigan	294	31,145	128	47	31,614
Mississippi	84	8,123	50	1	8,258
Nebraska	632	6,600	75	8	7,315
New York	1,545	76,610	429	216	78,800
Ohio	381	35,243	166	43	35,833
S. Carolina	333	1,5629	83	2	16,047
Total	6,128	315,846	1,025	541	324,440

* This category includes processors, wholesalers, food retailers and eating and drinking places.

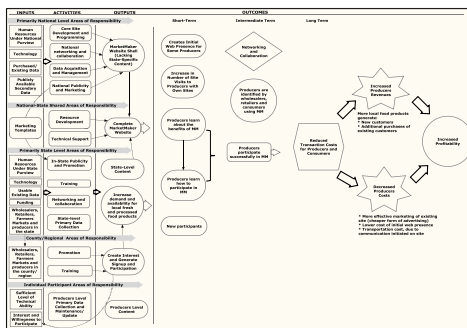
MARKETMAKER'S NUMBER OF WEBSITE HITS AND TOTAL USERS PER MONTH



- Logic models have been developed for producers, consumers, retailers, wholesalers, chefs/restaurants and farmer's market participants.

- Logic models illustrate an expected sequence of cause and effect relationships that lead to the achieving of a specific result

MARKETMAKER PRODUCER LOGIC MODEL



- The hypothesized sequence of cause-and-effect relationships and logical linkages among program resources, activities, outputs, and outcomes presented in the logic models sets the stage for the development of a system of quantifiable indicators that can be used as evaluation instruments.

PROPOSED METRICS FOR THE MM PRODUCER LOGIC MODEL

Outcomes	Metrics	
	Current	Future
Short-term		
New producers participating	# of new producers registered.	
Initial web presence through MM	# of producers with initial web presence through MM.	
Additional web presence through MM	# of producers with additional web presence through MM.	Δ hits in website due to MM.
Intermediate-term		
Number of additional contacts through MM (E-mail, etc.)		# of new contacts through MM. # of new contacts due to MM (e-mail, phone calls).
Use of MM as a market analysis tools		
Number of additional customers through MM (Individual and Institutional)		# of CTP* contact through MM by e-mail. # of CTP contact due to MM (e-mail, phone calls).
Number of new partnerships (Horizontal and Vertical)		# of PTP* and RTP* contact through MM by e-mail. # of PTP and RTP contact due to MM (e-mail, phone calls).
Long-term		
Increase in revenues (sales * price)		# of transactions due to MM. Monetary value of this transaction. Δ average price received. Δ amount sold through MM.
Change in marketing costs (time and Money)		Δ time spent marketing products. Δ in marketing expenditures.
Change in risk due to new partnerships initiated due to MM		% of sales contracted through MM.

* CTP = Consumers to Producers, PTP = Producers to Producers, RTP = Business to Producers

● We have conducted several focus group

- Moline, IL
- New York City, NY
- Washington, DC
- Denver, CO

● The information gathered has been used to improve MM website.

- E.g., improve search protocol for specific products

NEXT STEPS

- Identified evaluation priorities
- Develop primary and secondary data collection protocols and procedures for MM member states to implement in their respective states
- Development of a national level evaluative framework

“THANK YOU”

Reference:

Zapata, S., R.D. Lamie, C. E. Carpio, and O. Isengildina-Massa. *Evaluating the Impact of an Electronic Food Marketing Network. Research update, presented at the Food Distribution Research Society Annual Meeting, Denver, CO, Nov. 4, 2009.*

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