A Financial Mobilization Scan of Ontario's Food System

May 2016

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This report was prepared and written by Eco-Ethonomics Inc., a management consulting company, committed to solving problems that matter to people and the planet through social innovation, ethical leadership, community mobilization and cross-sector collaboration. Eco-Ethonomics specializes in advancing sustainable food systems through increased food sovereignty in Canada.

www.ecoethonomics.ca

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Introduction

Ontario's food movement includes all of the players involved in the food system from field to waste. The food system is characterized by seven components that flow in a cyclical process. The parts of the food system value chain include farm inputs, production, processing, wholesale, distribution, retail, consumption and waste management. Within each of these areas, communities, regions, provinces and territories and countries work in a variety of fashions within the food system. Many different groups of stakeholders are involved in the food system including, but not limited to, private businesses, not-for-profit organizations, government, foundations, industry, and public institutions. The focus of this report is on those organizations that provide funding for food related projects and organizations that apply for funding for food based projects.

This report is a financial mobilization scan; a scan conducted by analyzing the food funding landscape and conducting a landscape assessment on food system change. This financial mobilization scan examines food funding and food system change, from the funder and grantees perspectives. The analysis allows for an understanding of where financial resources are being allocated within the food sector, what food system areas food organizations are working in, the priorities of grantees and funders, and where they are similarities, gaps, and misalignments between the two groups. The work also examines the strengths, weaknesses, opportunities and barriers within Ontario's food system. Together, this information can be utilized to assess how funders and grantees can better align their efforts for greater food system change.

This report encompasses the perspectives and experiences of food funding applicants/ recipients and food funders through the use of three sources of information including, an online survey, the *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy* report,[1] and key informant interviews; the report is structured according to the source of information.

The section, *Funding Landscape – Perspectives of Food Funding Applicants and Recipients,* utilizes the results from an online survey. This section focuses on the experiences food funding applicants and recipients have had in applying for and receiving food funding.

The following section, *Funding Landscape – Perspectives of Food Funders,* utilizes the *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy* report to capture the grantmaking practices of an informal group of approximately 30 funders who fund food projects within Canada.

[1] Silkes, S., & Eco-Ethonomics Inc. (2016). *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy.* Print. P.30.

The next section, focuses on strengths, weaknesses, opportunities and barriers within Ontario's food system as identified through key informant interviews with food funders and food funding recipients. The report concludes with a section on future impact, showcasing how funders and grantees can work to create food system change moving forward.

Funding Landscape – Perspectives of Food Funding Applicants and Recipients

This report begins by examining the data that was gathered by Eco-Ethonomics Inc. through an online survey with Sustain Ontario and FoodShare Toronto. The purpose of the survey was to gain a greater understanding of the food funding landscape in Ontario and to provide a space to share helpful information on evaluation in food projects. Eligibility for the survey was limited to those engaged in food system work in Ontario who:

1. Had applied and/or received funding for food projects within the province; or were
2. A funder of food projects in Ontario

This section of the report focuses solely on the responses of food funding applicants/ recipients and questions related to the food funding landscape. Respondents were asked questions about their organization as a whole, and questions related specifically to their engagement in food work. The following section, "Overview of Organizations" pertains to questions that were asked about the organizations as a whole and therefore, their answers are not food project specific.

Overview of Organizations

The number of food funding applicants/recipients who completed the survey is 32. Of the 32 organizations, 15 were non-profits, 14 were non-profits with charitable status, 1 was a grass roots committee and another was unincorporated. The size of the organizations varied considerably with as little as 0 full-time employees to as high as 80. The average number of full-time employees was five and the median was 1.5. The total annual budget of the organizations surveyed also varied considerably with a range from $5,000 – $4,300,000 (average $487,518, median $188,000).

Amongst the respondents, the organizations focused on international efforts, provincial/territorial efforts within Canada or regional/community efforts within Ontario. Table 1 shows the geographical focus of each of the 32 respondents.

Table 1: Geographical Focus of Food Funding Applicants/Recipients

Geographical Focus	Response Percent	Response Count
International	3.1%	1
National	0.0%	0
Provincial/Territorial within Canada	16.1%	5
Regional/Community within Ontario	80.0%	24

Of the 5 organizations with a provincial/territorial focus within Canada, all five focused solely in Ontario. Of the 25 organizations with a regional/community geographical focus within Ontario, the following chart shows a break down (note: respondents were asked to select all applicable regions):

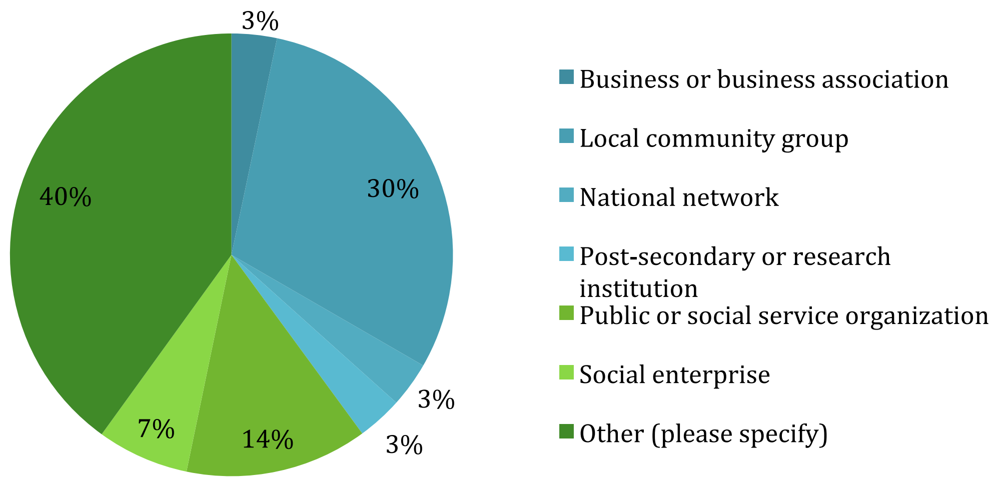
None of the respondents indicated that they worked in the following regions/communities: Brant, Cochrane, Dufferin, Durham, Frontenac, Haldimand, Hamilton, Hastings, Kawartha Lakes, Kenora, Lambton, Niagara, Norfolk, Oxford, Parry Sound, Peel, Peterborough, Prince Edward, Rainy River, Simcoe, Thunder Bay, Waterloo, Wellington and York.

When asked to pick a category that best described their organization, the following responses were selected. The category with the most responses was "Other" and the second largest group of respondents were "local community groups." Of the 40% of respondents who selected other, the 12 organizations described themselves as a farmland conservation/environmental organization, food rescue, food council, public health organization, a local chapter of a national organization, a regional food systems networking, collaboration and mobilization organization, farmer training and support organization, Community Future Development Corporation, hospital, local community group, and a network of local farmers, producers, transformers and businesses. The following figure shows a breakdown of how food-funding applicants/recipients described themselves.

Table 2: Regional/Community Geographical Focus Within Ontario

Region/Community Within Ontario	Percentage	Response Count
Algoma	15.0%	3
Bruce	5.0%	1
Chatham-Kent	10.0%	2
Elgin	5.0%	1
Essex	10.0%	2
Greater Sudbury	5.0%	1
Grey	5.0%	1
Haliburton	5.0%	1
Halton	10.0%	2
Huron	5.0%	1
Lanark	5.0%	1
Leeds and Grenville	10.0%	2
Lennox and Addington	5.0%	1
Manitoulin	20.0%	4
Middlesex	5.0%	1
Muskoka	5.0%	1
Nipissing	5.0%	1
Northumberland	5.0%	1
Ottawa	10.0%	2
Perth	5.0%	1
Prescott and Russell	15.0%	3
Renfrew	5.0%	1
Stormont, Dundas and Glengarry	15.0%	3
Sudbury	20.0%	4
Timiskaming	5.0%	1
Toronto	5.0%	1
Other	20.0%	4

Figure 1: Description of Food-Funding Applicant/ Recipient



Funding Portfolio and Experiences

Many organizations require funding to support their projects, regardless of whether they are food based or not. This section describes the experiences of organizations that are applying for funding (for food projects and other types of projects). On average, the organizations apply for nine grants annually (median of 5.5). Of those surveyed, respondents stated that they applied for anywhere between 0 and 35 grants on an annual basis. Of the grants received, the average value of all grants was $188,500 (range from $5,000 – $1,800,000, median of $72,500).

Many organizations noted the considerable amount of work and time spent applying and receiving a grant.[2] Organizations noted that on average it takes 10 days to apply for a grant. At an average of 9 applications, a total of 90 days is spent (on average) applying for grants, for a total of three months time! After the 10 days spent applying, organizations wait 100 days (on average) before hearing whether they have received the funding and if successful, another 69 days on average before they receive the money.

By speaking with food funders, it was mentioned that a diversified funding portfolio was an important factor in deciding to support an organization as it signalled to the funder that the organization was more financially sustainable.[3] Respondents were asked to showcase their funding portfolio through indicating the percentage of their funding that came from government, non-government (foundations, corporations, private individuals, non-profit grantmakers) and other (gifts and donations) (for a

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[2] Anonymous. (September – October 2015). *Key Informant Interview.*
[3] Anonymous. (September – October 2015). *Key Informant Interview.*

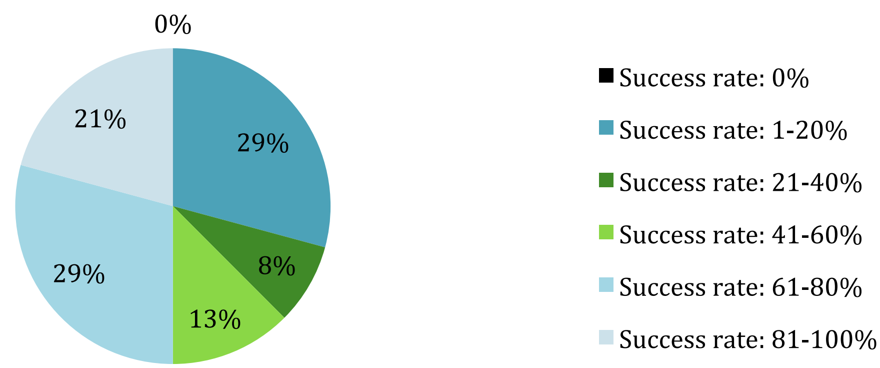
total of 100%). This would provide an indication of how many grantees have a diversified funding portfolio and are therefore, more “appealing” to food funders. The typical funding portfolio consisted of 30% funding from government, 54% from non-government and 21% from other. The amount of funding from each source was highly variable amongst the respondents. Whereas the typical funding portfolio appears to have a good balance of government, non-government and other funding, when the individual funding portfolios are examined this balance is not observed. When a diversified funding portfolio is defined as not having more than 65% of funding from any one source, only 7 of the 25 organizations have a diversified funding portfolio. For each of the individual categories of funding, some organizations relied on government and non-government funding sources anywhere from 0% to 100% of their funding. Funding within the ‘other’ category made up anywhere from 0-89% of organizations funding profiles.

Funding Experiences for Food Projects

Information was also gathered about the food projects respondents are working on. The majority of projects were community food initiatives (an average of 67% of projects and a median of 85% of projects), with food system initiatives following closely behind with 51% of projects (on average, median 50% of projects). Once again, there is a high variation between the respondents as to the type of food initiatives they work on. Community food initiatives ranged from as little as 10% to 100% and food system initiatives ranged from 0% to 100% of the work of the organizations surveyed.

Respondents were asked how many food project grants they apply for and receive per year. On average, respondents apply for 6 food grants (range from 1-24 grants, median of 4) on an annual basis. When the average number of total grants applied for (9) is compared to the average number of food grants applied for (6), it can be seen that 66.7% of grants applied for on an annual basis are food projects. However, not all the food grants that are applied for are received by the organization. Figure 2 shows an interesting distribution of success rates as the largest percentages of respondents had very different success rates when applying for funding. Figure 2 shows the success rate of food grant applications. Figure 2 shows that a significant proportion of organizations are unlikely to succeed in receiving food funding (29% are successful 1-20% of the time). Interestingly, 50% of the respondents are successful 60%-100% of the time and 50% are successful less than 60% of the time. It is not clear based on survey data why some organizations are successful in receiving food funding and an equal portion is not very successful. Further research is needed in this area to explore why some organizations are more successful than others in receiving food funding.

Figure 2: Success Rate of Grants Applied For To Support Food Projects

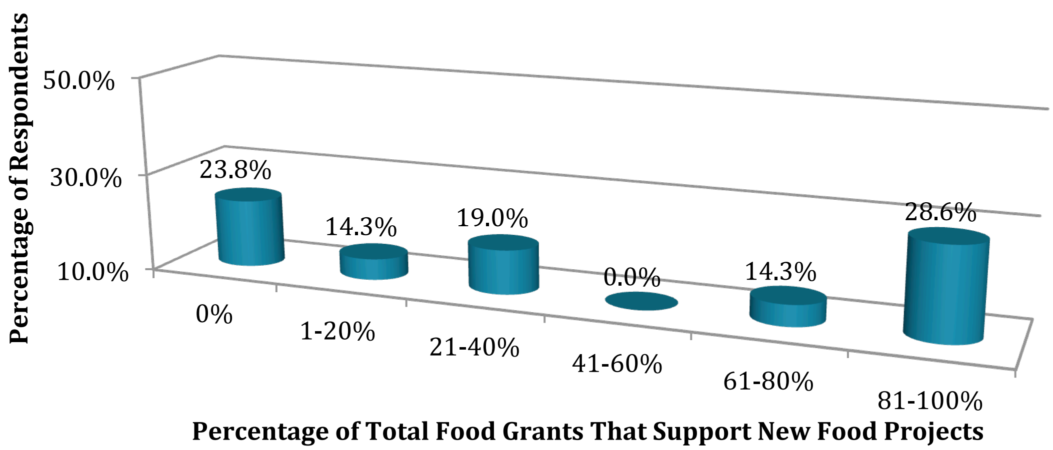


Respondents were also asked how much food funding they apply for on an annual basis, and of the total amount they request, how much they receive. On average, respondents receive 56.5% of all the food funding they apply for (calculated by individual responses). It is important to note that the responses for this question were based on the total amount of funding requested (successful and unsuccessful applications) compared to the total amount they received (successful application). Therefore, no conclusion can be made about the percentage of funding granted compared to the amount requested, per project. The average amount of money (for food projects) the organizations apply for is $174,524 and the average value they receive is $87,296. Once again, there is a large variation in the amount of money that organizations apply for and receive. The range in average value of grants applied for is $5,000 to $1,000,000 (median of $80,000) and the range in average value of grants received is $3,500 to $600,000 (median of $37,500).

Food funding applicants/recipients were then asked to focus solely on the food funding they had been successful in receiving. The average maximum amount received for one food project is $162,748 (the maximum amounts ranged from $3,500 to $989,000, showing a very large range in the amount of food funding organizations are receiving). The median maximum amount received for one food project is $120,500. The higher end of the range shows that there are some large food grants being distributed to the food sector; however, we do not know about the restrictions that came with these larger size grants. Of the grant amounts provided, 12 of the 22 were over $110,000 and 5 of the 12 were over $200,000.

To gain a greater understanding of new food project initiatives that were being initiated in the food sector, a few questions were asked specifically about new food projects. On average, organizations initiate two new food projects on an annual basis. While some organizations did not always initiate a new food project on an annual basis, some initiate as much as six new food projects on an annual basis. It was also inquired as to what percent of all food grants received are for new food projects. Amongst respondents, the largest percentage of respondents, 28.6%, have 81-100% of their total food grants supporting new food projects. Feedback from food organizations voiced a desire for food funders to stop focusing on only funding new projects, but to also focus on funding on-going projects.[4] Figure 3 shows that a relatively equal number of organizations have the majority of funding supporting new food projects (28.6% spend 81-100% of total food funding on new food projects) as organizations who have 0% of their total food funding supporting new food projects (23.8% of organizations). Interestingly, those who have 81-100% of their total food funding towards new food projects have a much larger total annual budget compared to those who have 0% of total food funding for new food projects ($411,583 average annual budget compared to $153,600 respectively). The average value of food grants received on an annual basis between the groups was very similar (a difference of approximately $11,000) but they had very different success rates when applying for food projects. For those who had 81-100% of funding supporting new food projects, they were much more successful at receiving grants they had applied for (83.33% of the organizations were successful 61-100% of the time compared to 20% of organizations who had 0% of their food funding for new food projects).

Figure 3: Percentage of Food Grants Received To Support New Food Projects (Annual Basis)

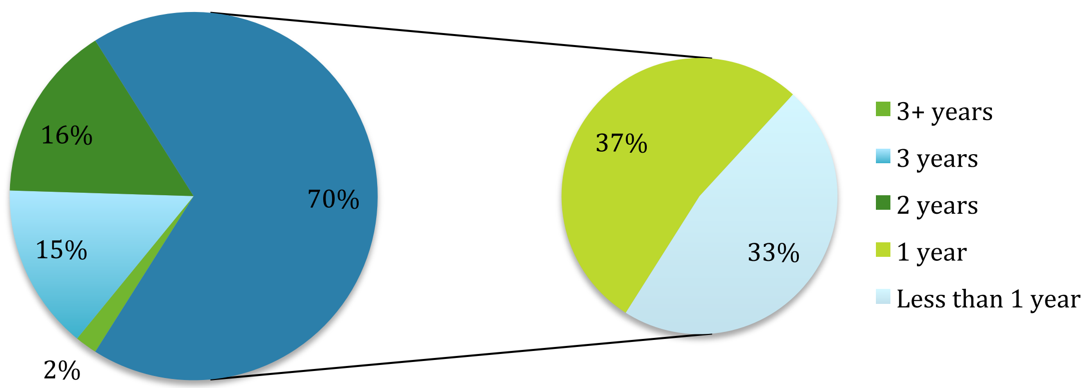


The period of time in which funders support food projects was also examined. Responses show that funders are most likely to fund projects for the duration of a year or less. 69.8% of all funding received by the organization was to support projects for a year or less. Only 16% of food funding is for a two-year duration, 15.5% for a three-year duration and 1.9% is for three years or more (Figure 4). Key informants from food organizations spoke many times about how the limited

[4] Anonymous. (September – October 2015). *Key Informant Interview.*

duration of funding for food projects makes it difficult to continue and expand projects on an ongoing basis.[5] This data clearly shows that funders are only supporting food projects for a limited duration. These results are indicative of a general sector trend in which there is a shift for funding to be utilized for the project, rather than core funding for the organization.

Figure 4: Length of Grant Period for Food Funding



Respondents were asked to provide the areas of the food system they were working in (Figure 5). The areas of greatest focus by the organizations surveyed are education (54.2%), food marketing (45.8%), food production (41.7%), social enterprise development (41.7%), and food access and nutrition (41.7%). In comparing the food system areas in which organizations are working, and which of these areas they have received funding for, the areas of food system work in which funding is being allocated to can be uncovered (Table 3). Based on the information provided by respondents, it appears that most of the food work in food processing and manufacturing, food marketing, workforce development, and retail food outlets is funded (>85% of projects in these areas are funded). However, there are some substantial differences in the lack of funding being allocated towards other areas of the food system including:

- Regulation and policy (only 22.2% of projects are funded);
- Health and nutritional quality of food (only 57.1% of projects are funded);
- Food access and nutrition (only 60% of projects are funded);
- Food distribution and storage (only 62.5% of projects are funded); and
- Energy (only 66.7% of projects are funded)

Interestingly, health and nutritional quality of food and food access and nutrition were two of the under-funded areas, although many projects of this focus receive

[5] Anonymous. (September – October 2015). *Key Informant Interview.*

funding through public health (public dollars flow from the Ministry of Health and Long-term Care). Public health funding does not require a grant application, so it is possible that respondents may not have considered the funding received through public health when answering this question, as many of the questions prior to focused on grant applications. If this did occur, it would have skewed the results and shown health and nutritional quality of food and food access and nutrition to be less funded than they truly are.

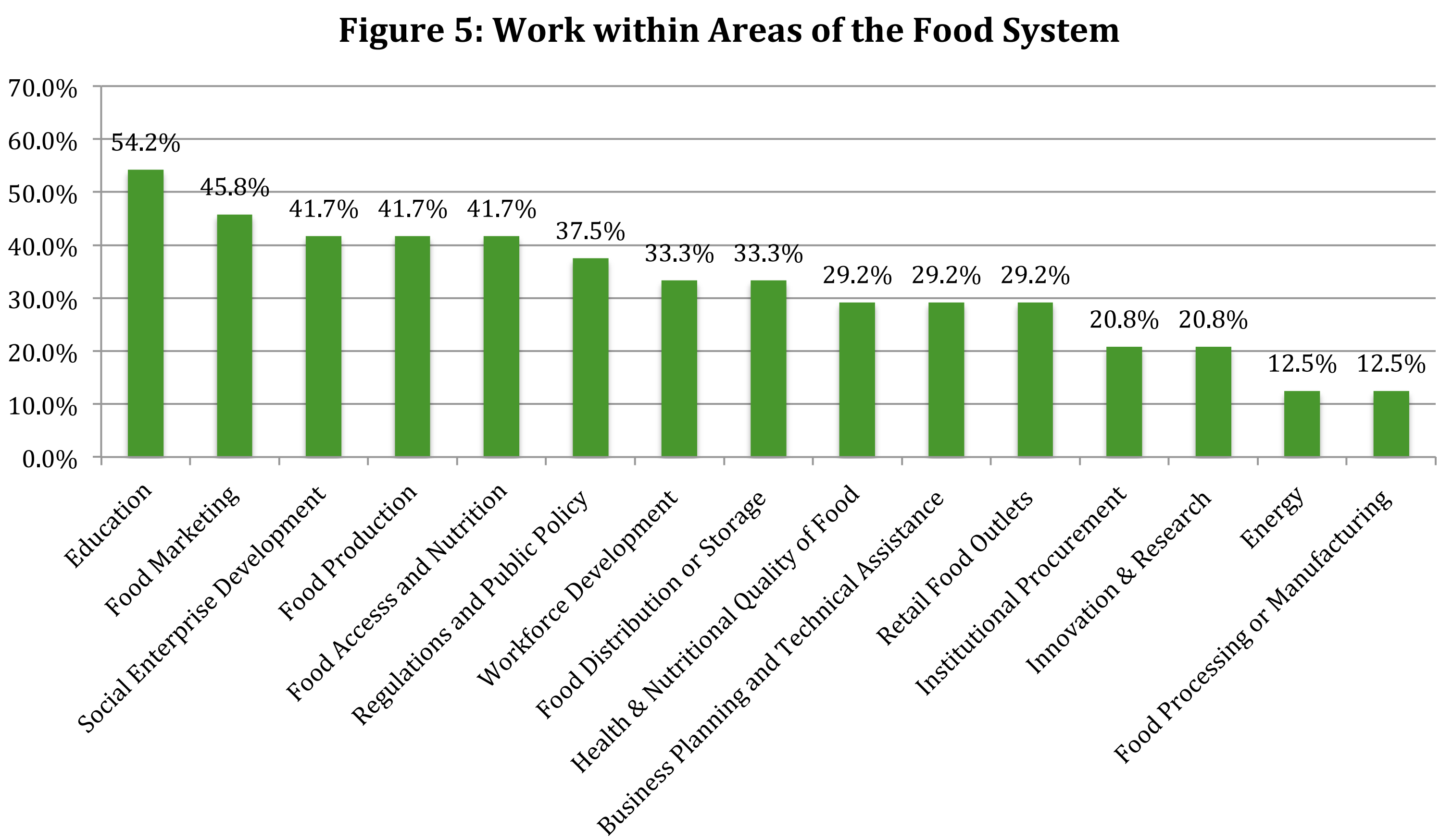
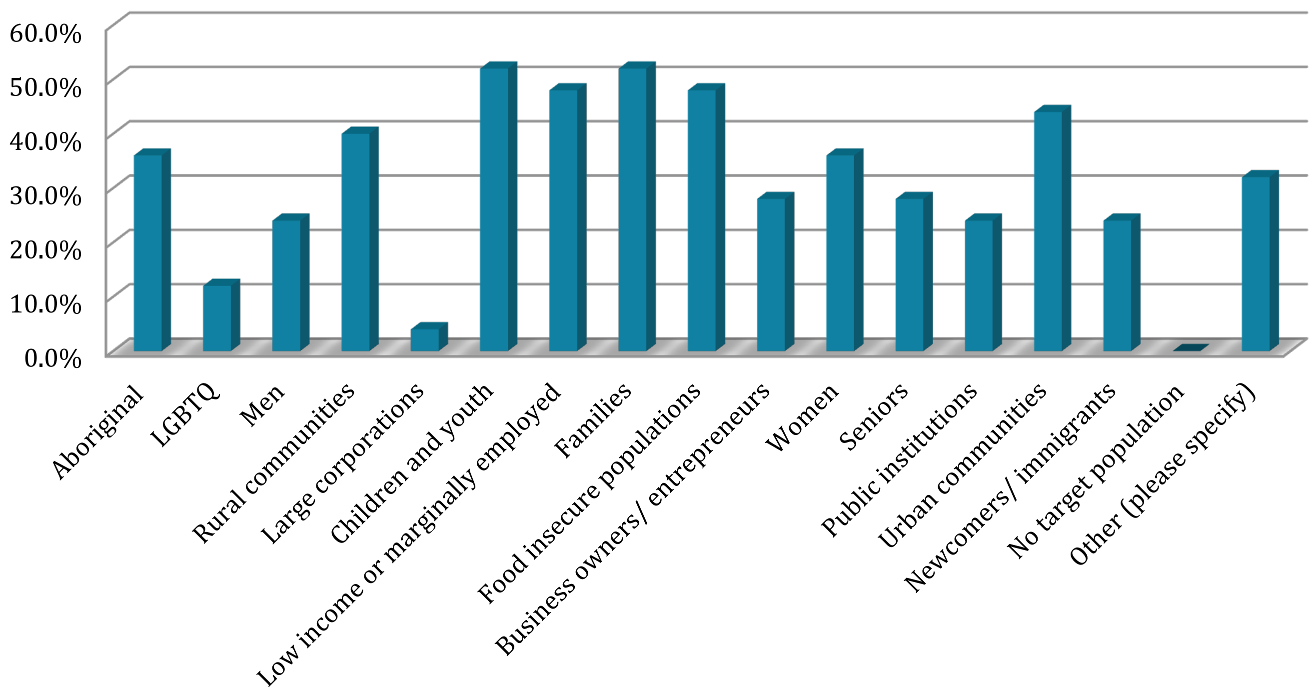


Table 3: Areas of Food System Work and Funding Allocation

Area of Food System Work	Percentage of Respondents Working in the Area	Percentage of Respondents Working in the Area Who Have Received Funding
Food Marketing (e.g. Agriculture and local food tourism)	45.8%	90.9%
Food Production (e.g. Animal, vegetable, vineyards, etc.)	41.7%	80%
Food Processing or Manufacturing (e.g. Bakeries, meat processing, etc.)	12.5%	100%
Food Distribution or Storage (e.g. Food hubs/aggregation facilities, distribution)	33.3%	62.5%
Retail Food Outlets (e.g. Co-ops, CSAs, farmers markets, restaurants, etc.)	29.2%	85.7%
Food Access and Nutrition (e.g. Food banks, community gardens, meal programs, transition towns)	41.7%	60%
Education (e.g. Continuing education, technical education centres, out of school programs, food skills programs, etc.)	54.2%	84.6%
Health & Nutritional Quality of Food (e.g. food supply quality, children's nutrition, etc.)	29.2%	57.1%
Workforce Development (e.g. Internship, apprenticeship, mentor programs, etc.)	33.3%	87.5%
Business Planning and Technical Assistance (e.g. Access to capital, feasibility and planning, land access, packaging and safety, regulation and permits, human resources, etc.)	29.2%	85.7%
Energy (e.g. Biodiesel, methane digester site, solar, wind, etc.)	12.5%	66.7%
Institutional Procurement (e.g. Hospital purchasing policies, etc.)	20.8%	80%
Regulations and Public Policy (e.g. Advocacy organizations, regulation authorities)	37.5%	22.2%
Innovation & Research (e.g. R&D support)	20.8%	80%
Social Enterprise Development (e.g. Food system related social enterprises)	41.7%	70%

Within these food system areas, organizations target a wide variety of populations, communities and markets. The most prominent target populations amongst organizations working on food projects include children and youth (52%), families (52%), low income or marginally employed (48%), food insecure populations (48%), urban communities (44%), and rural communities (40%). Figure 6 shows a breakdown of all the target populations, communities and markets provided. Within the five most prominent target populations, 21 of the 22 were working to serve these populations. 18 of the organizations were targeting children, youth and families (two most prominent target populations) and16 of the organizations were targeting children, youth, families, low income/ marginally employed, and food insecure populations (four most prominent target populations).

Figure 6: Target Populations, Communities and Markets of Food Projects



Role of Funders in Food System Change

Respondents provided a description of the role they see funders playing in supporting food system change. While many of the roles identified were financial in nature, respondents also noted some additional roles funders could undertake within their work. The different roles mentioned include:

- Financial assistance;
  - Seed funding

    - Providing funds for operating costs (rather than solely for new projects)
    - Financing (i.e. loans, mixed grant-loan products, and others)
    - Multi-year funding to invest in the longer-term outcomes of projects
    - Flexibility in eligibility criteria
    - Support projects in scaling up (i.e. larger multi-year grants for proven interventions/programs)
- Developing evaluation frameworks with outcomes and indicators (with the organizations as part of the application process);
- Work in collaboration with others (multi-stakeholder engagement);
- Work with food organizations to gain a greater understanding of the issues involved with non-profit work within the food sector (discover the solutions together); and
- Assistance with marketing efforts.

While it is clear that funders play an integral role in providing the financial resources needed to implement and sustain food projects, survey responses show that there are more ways they can support organizations than just money. Indeed, this is true from the funder perspective as well. Funders have significant assets that can be leveraged (besides financial) for food system change including social, human and intellectual capital for example.

Funding Landscape – Perspectives of Food Funders

As mentioned previously, food funders were also asked to complete the same survey. Numerous outreach efforts were made to encourage funders to complete the survey, however the response count was very low. Of the five funders who responded, only two completed the survey. The other three completed less than 10% of the survey. Due to the limited response count, the data gathered from the two funders will not be analyzed as it would not be reflective of food funders as a whole.

In Ontario, food projects are just one of the many areas that receive funding. Key informants noted that it is often difficult to conduct a landscape assessment on food funding, as funding for food projects often stems from many different types of funding streams. For example, a community food initiative that provides locally grown healthy snacks for children in schools can be funded through streams focusing on health, children and youth, and education in addition to funding that is more food focused such as those funds attributed to supporting local producers. The ability of food to cross jurisdictional boundaries and traditional domains of service and dollars is referred to as the “intersectionality of food.” The survey required food funders to provide information specifically to food-funded projects, and many funders do not track information in the format requested in the survey. Often food project grants are not separated out from funders general tracking data on grantees and funds awarded, making it more challenging to complete the survey.

The following information was gleaned from *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy,* a recent report that examined information on a food funding collaborative that funds projects across Canada.[6] The majority of funders in the report fund projects within Ontario and beyond it's borders; as a result, there are very few food funders who focus solely on Ontario. With this in mind, in order to conduct a financial scan on food funders the decision was made to include those funders who also fund outside of Ontario. The following information pertains to food funders supporting food projects across Canada.

A total of 19 different funders who are involved in grantmaking activities within the food sector completed an online survey that explored the organizations' allocations of financial capital. Of the 19 respondents, there were 13 foundations (five private, five public, and three community foundations), one regional crown corporation, one cooperative credit union, three networks, and one alliance. There were no government funders included in this sample. This is important to keep in mind throughout interpreting the data provided by the food funder collaborative, as the government provides most of the money for projects that touch on food and the food system. However, the government does not report on their allocation of funds so it's not clear and transparent as to where government dollars are being invested.

The 19 funders varied in geographical focus as some were regionally focused (n=7), others provincially focused (n=6), some nationally focused (n=5) and one is internationally focused. The aggregated information provided in this report pertains to 15 of the 19 funders who completed the survey (see Table 4 for a list of respondents), as 3 of the funders were not involved in grantmaking themselves, or were unable to provide annual granting information, and 1 of the funders information was not included in the analysis. In some cases, comparisons between the data gathered from food funding applicants/recipients and food funders are hard to make as the food funders are funding in Ontario and beyond, whereas the food funding applicants/recipients are only working within Ontario.

[6] Silkes, S., & Eco-Ethonomics Inc. (2016). *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy.* Print.

Table 4: Survey Respondents for Aggregated Data Found in Table 5

Survey Respondents for Aggregated Information	Geographical Focus
Greenbelt Fund	Provincial - Ontario
Ontario Trillium Foundation	Provincial - Ontario
Helderleigh Foundation	Provincial - Ontario
Real Estate Foundation of British Columbia	Provincial – British Columbia
Vancouver Foundation	Provincial – British Columbia
Toronto Foundation	Regional – Toronto and the GTA
George Cedric Metcalf Charitable Foundation	Regional – Toronto Region
Tides Canada	Regional – Southern Ontario, Northern Manitoba, British Columbia
Columbia Basin Trust	Regional – Columbia Basin
Foundation Quebec Philanthrope	Regional – Greater Quebec City
Vancity Envirofund	Regional – Vancouver Lower Mainland, Fraser Valley and Greater Victoria
Victoria Foundation	Regional – Greater Victoria and Vancouver Island
The J.W. McConnell Family Foundation	National
Donner Canadian Foundation	National
Sprott Foundation	National

The report provides aggregated information on the annual grantmaking of food funders (Table 5). Of the total grantmaking amount of the food funder collaborative, 6.5% is allocated to food sector granting. Some of the funders were more heavily involved in food sector granting than others (the range of total food funding is from $100,000 to $7.4 million). Of the average number of grants distributed, 2.68% of grants are distributed to the food sector. This data shows that many food funders are largely involved in funding other areas of work, while others, a much smaller amount, are focusing the majority of their granting efforts to the food sector (e.g. Greenbelt Fund, Helderleigh Foundation, The Brian and Joannah Lawson Family Foundation). Food funders allocated anywhere between 2 to 63 of their grants to the food sector of their total grantingmaking which ranged from 13 to 5,000. Of those funders (n=12) who provided both their average number of grants per year and average number of food grants per year, the average amount of grants allocated to the food sector as a percentage of total grantmaking is 21% (range of 0.4% to 100% of all grantmaking, median of 10%).

Table 5: Grantmaking of Food Funders

Annual Granting	Food Sector Granting
Total annual grantmaking amount = ~$252,670,000	Total annual grantmaking amount = ~$16,523,192 (range from $100,000 to $7.4 million)
Total average number of grants distributed = ~8,395	Total average number of grants distributed = ~225
Grants distributed per year = 13 to 5,000	Grants distributed per year = 2 to 63

The survey captured which areas of the food system funders (from public and private foundations) had funded within the past five years (Figure 7). It is apparent that the most common areas for food funders to fund are food access and nutrition; education; social enterprise development; food distribution or storage; nutritional quality of food; workforce development and food production. It is not clear as to whether these seven areas are the most funded in terms of dollars, but they certainly are the areas food funders are most willing to support. With the greatest amount of opportunity available in these areas, it suggests that food grant applicants/recipients would be more likely to receive funding in these areas (depending on the level of demand). Of the top seven areas the pubic and private foundations fund, there is an opportunity for organizations to get more involved in these areas as in only one area (education) were more then 50% of food grant applicants/recipients involved in this area of work (see Table 6).

Figure 7: Funded Areas of the Food System

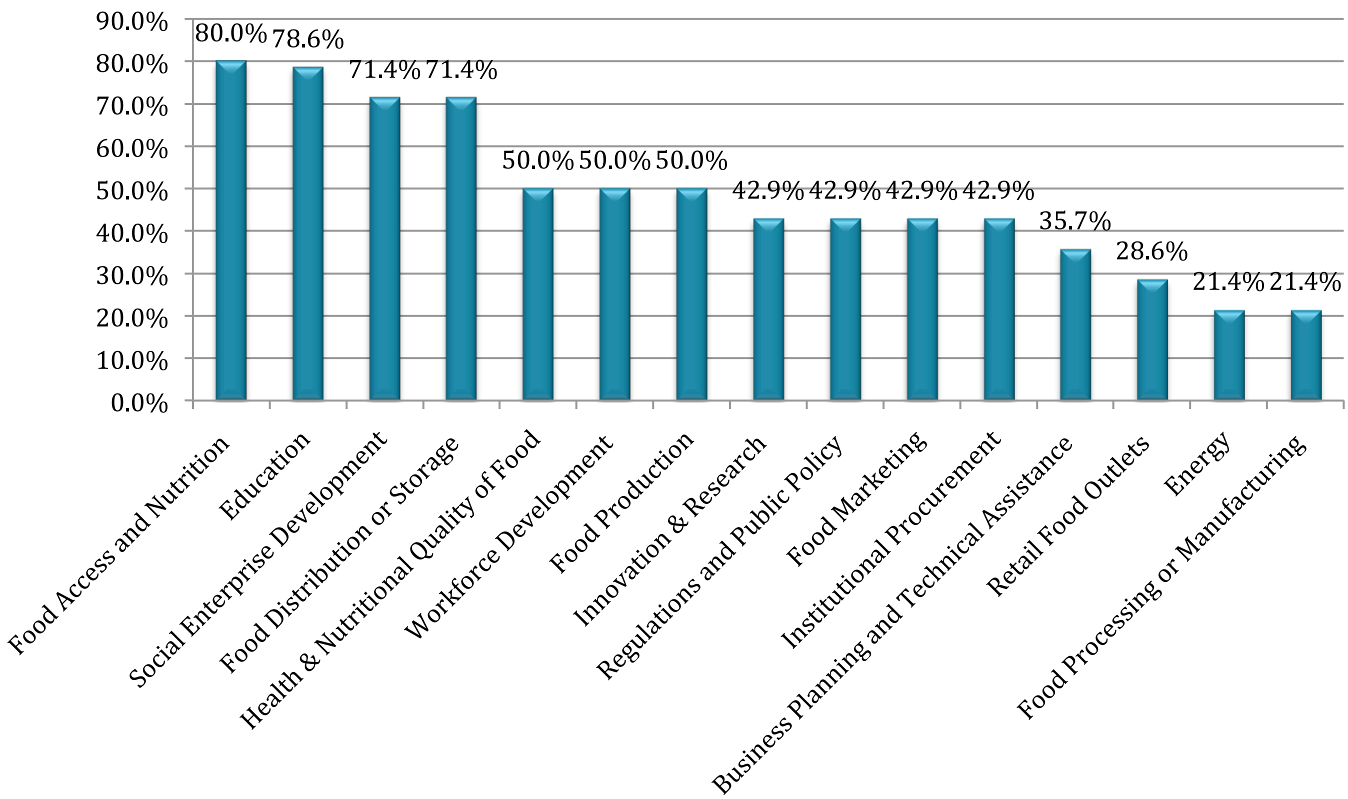


Table 6: Funded Food System Areas and Organization Involvement

Most Common Food System Areas for Food Funders	Percentage of Food Grant Applicants/Recipients Working in the Area
Food access and nutrition (80%)	41.7%
Education (78.6%)	54.2%
Social enterprise development (71.4%)	41.7%
Food distribution or storage (71.4%)	33.3%
Health and nutritional quality of food (50%)	29.2%
Workforce development (50%)	33.3%
Food production (50%)	41.7%

Individual funder profiles were created for each of the funders who completed the online surveys. Aggregated information on grant durations and grant size can be examined through 14 of these profiles (this information was not provided in five of the funder profiles for various reasons). For these funders, the average grant duration is 1.77 years (1 year and 9 months, n=11). This length of time is several months longer than the survey responses from food funding applicants/recipients in which the majority of grants (70%) were a year (37%) or less (33%) in duration.

The average grant size of the food funders is $903,434 (range between $6,957 and $450,000, median of $63,739, n=12). The largest grant size allocated amongst the food funders was for $5,000,000; whereas with the food funding applicants/ recipients the largest grant ever received amongst the respondents was for $989,000. The average maximum grant size for food funders was $733,002 (n=13) and for food funding applicants/recipients it was $162,748. Considerable differences exist between the maximum grant size given/received and the average maximum grant size given/received amongst food funders and food funding applicants/recipients. It is not clear whether these differences exist because the food funders do not fund the food funding applicants/ recipients who were surveyed, whether the food funding applicants/ recipients are not applying for really large grants, or some other reason. Further research in this area is needed to explore which funders are granting large amounts, who is applying for these grants, and who is receiving them.

Overall, there are many key insights that were learned from the online survey and the *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy* report. There are five areas of work within the food system that are highly under-funded including regulation and policy (only 22.2% of projects are funded); health and nutritional quality of food (only 57.1% of projects are funded); food access and nutrition (only 60% of projects are funded); food distribution and storage (only 62.5% of projects are funded); and energy (only 66.7% of projects are funded). Increasing the amount of funding to these five areas are key opportunities that funders can capitalize on to better support food funding applicants/ recipients. Regulation and policy is an area that is imperative to food system change and yet it is grossly under-funded. This is caused by restrictions of political activity for charities and rules and regulations for foundations around directing funds to charitable organizations. Additionally, there are a number of ways funders can better support food organizations that are not solely funding related. Assistance with evaluation and working in collaboration were two ideas, of others, that were proposed by food organizations.

The majority of the grants food applicants/ recipients receive (70%) are for one year or less and are project based. Funding of this nature is problematic for food organizations because it doesn't allow for ongoing and successful projects to continue or scale up. Within the funding picture captured thus far, the government is completely absent from the financial picture. Given that the government plays a large role in funding projects that touch food and the food system, they need to be engaged in as a key partner in future efforts to examine the funding landscape. Additionally, in order to gain a greater understanding of the funding landscape funder data must be shared and tracked specific to the food system. Having a through understanding of the funding landscape will allow for progress to be made in food system change and outcomes to be documented.

Landscape Assessment of Ontario's Food System

As mentioned, part of the financial mobilization scan involved many conversations with key informants. Eco-Ethonomics Inc. engaged 26 key stakeholders in hour-long interviews to discuss their perceptions of change in Ontario's food system and funding practices in the food system. Key stakeholders included 17 food funding recipients (including businesses and non-profit organizations working in Ontario's food system) and nine food funders (including private, public, and community foundations, government agencies (at the regional, provincial, and national levels), investors and financiers). The following information captures their unique perspectives on different issues within the Ontario food system. It should be noted that the data provided is based on the perceptions of key informants and has not been verified by the authors of this report, in order to stay true to the opinions of the stakeholders. Table 7 and 8 lists the organizations that were engaged in key informant interviews.

Table 7: List of Key Informants – Food Funding Recipients

Food Funding Recipients	
Abbey Garden Community Trust	Project SOIL
Algoma Food Network	The Inn Good Shepherd
All Things Food	The Local Community Food Centre
Greenest City	The Stop
Guelph Wellington Local Food	Thunder Bay Food Strategy
Harvest Hastings	Toronto and Region Conservation Authority
Headwaters Food and Farming Alliance	Toronto Food Strategy
Michigan Good Food Charter	Waterloo Region Food System Roundtable
Ojo Eat Local	

Table 8: List of Key Informants – Food Funders

Food Funders	
Carrot Cache	George Cedric Metcalf Charitable Foundation
Community Foundations of Canada	Ministry of Agriculture, Food and Rural Affairs (x2)
Greenbelt Fund	Ontario Trillium Foundation
J.W. McConnell Foundation	T D Friends of the Environment

Perceptions of Funded Areas of the Food System

Food funding recipients were asked to identify areas of the Ontario food system that they perceived as receiving the most and the least funding. Similarly, food funders were asked to identify areas of the Ontario food system they were most likely and least likely to fund. As a general observation, not all food funders had specific food funding streams but rather some had funding streams that focused on other topics and food projects served to meet those objectives. For example, Metcalf Foundation's Inclusive Local Economies Opportunities Fund focuses on improving the economic livelihoods of the working poor in Toronto. Food is a reoccurring theme within this fund as a lot of the work focuses on, "…micro food businesses development, building career ladders for food servers/hospitality workers, improving the quality of jobs of food service workers, and improving access to healthy food for vulnerable people in Toronto through community based food procurement and distribution."[7]

Tables 9 and 10 show the responses from each group of informants.

Most Funded Areas of the Food System

As can be seen in Table 9 there are very clear misalignments between what food funding recipients perceive to be the most funded areas of the food system and what food funders said they are most likely to support. The only commonalities are the perspectives that innovation tends to be heavily funded and research (although perceptions differed on what types of research were getting the most funding). It is possible that the misalignments in perceptions are due to the different perspectives the two groups have. Based on the areas that food funding recipients believed were the most funded, it appears that they focused mostly on the areas supported by government funding dollars and did not acknowledge to the same degree the areas of the food system that private and public foundations often support. It is possible that grant recipients provided this observation because they believe the greatest

[7] Silkes, S., & Eco-Ethonomics Inc. (2016). *Sustainable Food Systems: A Landscape Assessment for Canadian Philanthropy.* Print. P.30.

amount of dollars to originate from government sources. The underlying assumption is perhaps well known - whatever areas the government funds are by far the most well funded areas of the food system. This interpretation of the perceptions shared through the key informant interviews was not verified due to the limited information available on government funding and grants distributed.

There are direct contrasts in areas perceived to be the most funded within the food system. While recipients perceived conventional agriculture and the mainstream industrial/corporate food system to be heavily funded, funders believed family farms to receive a lot of funding; and where recipients think projects within large agriculture geographies and processing for export receive a lot of funding, funders thought community garden projects got a lot of funding. This shows a direct contrast as community gardens are small scale projects that grow food with intention of local consumption.

Table 9: Perceptions of Most Funded Areas

Funding Recipients	Food Funders
Public health and safety, e.g. healthy eating initiatives (n = 6)	Education and awareness (n = 2)
Conventional agriculture and mainstream industrial/corporate food system (n = 5)	Family farms
Research of food crops and products	Research and best practices
Innovation	Innovation (n = 2)
Short-term reactionary projects	Food system infrastructure, food hubs and networks (n = 2)
For profit food businesses	Urban food security
Supply chain	Regional and local networks (value chain relationships)
Projects within large agricultural geographies	Community garden projects
Processing for export	Economically sustainable projects
	Employment
	Marketing and promotion
	Sustainability projects (n = 2)

Least Funded Areas of the Food System

There were also not many similarities between what food funding recipients and food funders thought were the least funded areas of the food system (Table 10). The funding allocated to events was one similarity between the groups as was the funding for agriculture production (however, recipients specifically noted urban agriculture as the least funded area within agriculture production).

Where the perceptions of most and least funded areas in the food system become particularly interesting are when we compare the answers between recipients most funded areas and funders least funded areas and vice versa. When these comparisons are made, what's interesting is that funding recipients noted research of food crops and products as one of the most funded areas; however, funders stated that they are least likely to fund science-based research (this finding supports the observation that food funding recipients spoke almost exclusively about government funders, rather than funders as a whole). Additionally, food funding recipients thought for-profit food businesses received a lot of funding, but funders think non-charitable/private businesses are one of the least funded areas. Food funders themselves also differed in their opinions as a group, whereas some thought family farms were heavily funded, others thought agricultural production was one of the least funded areas.

Table 10: Perceptions of Least Funded Areas

Funding Recipients	Food Funders
Community-based food initiatives (n = 4)	Large infrastructure (n=2)
Urban agriculture	Agricultural production
Food security (n=4)	Linear projects
Small business	Non-charitable/ private businesses
Events	Travel and education (e.g. conference attendance); Low economic impact projects, e.g. marketing and promotion, events
Food literacy	High tech
New and/or small producers	Science-based research
Sustainable agriculture	
Poverty reduction	
Long-term systemic projects (n = 2)	
Small/ niche processing (n=2)	
Non-profit projects	
Existing projects	
Youth education	
Micro-local	

Food Funding Priorities

When asked what priorities food funding recipients think food funders have, many responded that priority lays with projects/businesses that are large in scale and have a greater impact (e.g. funding large companies, large events, and larger scale projects). Other funder priorities identified by food funding recipients include: food access; food skills and food education; urban agriculture; money for business to expand; organizations with experience in food projects; research; and funding for projects, rather than core funding.

Food funding recipients were also asked what food funding priorities they think food funders should have. Interestingly, there was no consistency between the priorities they believe they have, and the ones they think food funders should have. This shows a clear misalignment between the necessary priorities within the food system and where food funders are perceived to be focusing/prioritizing (see Table 11). Food funding recipients argued that funders should prioritize core funding opportunities (n=4), funding for grassroots organizations, long-term funding (n=2), food based projects, more equitable distribution of money, projects focused on processing, and funding for creating good paying jobs.

Table 11: Perceived Funder Priorities and Needed Priorities

Priorities that Recipients Think Funders HAVE	Priorities that Recipients Think Funders SHOULD HAVE
Large-scale, High Impact	Core Funding
Food Access	Long-term
Food Literacy	Grassroots Organizations
Urban Agriculture	Equitable Distribution of Funds
Business Expansion	Food-based Projects
Research	Job Creation
Project Oriented	

In order to discover if there was a clear misalignment between needed priorities and current priorities of food funders, the funders were asked to identify their priorities for food based projects. Based on funder responses, some funders identified funding priorities within a wide variety of areas, while other funders did not identify their priorities. Food funders noted prioritizing projects with economic impact (such as increased consumption of local food) (n=2), innovation, resilience, sustainability, systems approaches, national based projects/ Ontario focused projects, the environment (x2), and projects that result in people being active, connected in their communities, inspired, prosperous, or create a bright future for young people.

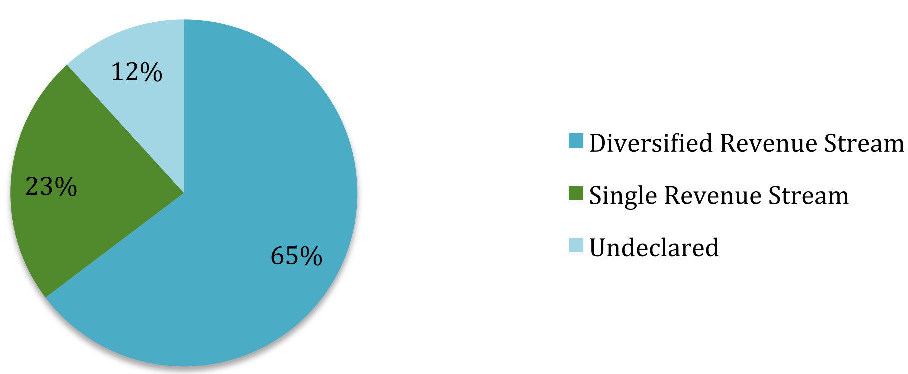
Intriguingly, food funding recipients perceptions of food funder priorities were only seen to be in line in regards to the identified priority of food based projects that result in high impact; this appears to demonstrate a lack of awareness of funder priorities amongst food funding recipients, at least among those that were interviewed. However, it is also possible that this misalignment exists because food funding recipients were thinking mostly about government funders of food projects, rather than the broad range of groups that fund food projects. If so, this misalignment would exist because food funding recipients were thinking about government funders, whereas, the funders interviewed were representing the priorities of public and private foundations and the provincial government.

Revenue Streams and Funding Conditions

Food funding recipients were asked whether or not their organizations had diversified revenue streams, and if so what these revenue streams look like. The majority (65%) of organizations reported having diversified revenue streams and 23% reported having a single revenue stream. Examples of different revenue streams as reflected in key informant interviews include:

- Government funding
- Public and private foundation funding
- Donations
- Social enterprise
- Events
- Sponsorship
- Membership fees
- Leasing building/land

Figure 8: Food Funding Receipient Revenue Streams



Food funders were also asked whether or not they required organizations that they fund to have diversified revenue streams. Relatively few funders (n = 2) indicated that they do require organizations to have diversified revenue streams. These funders explained that they did not want to be the sole funder of a project and that having a diversified revenue stream ensured that both the organization is stable and the project is sustainable. These assumptions of funders should be challenged, as funding is not the determining factor of sustainability; the commitment of staff and volunteers and the demand for service are two other factors that effect sustainability. A number of food funders (n = 4) did not explicitly require organizations to have diversified revenue streams but indicated that they do look at the financials of each organization when considering funding and would like to see organizations make their own financial contribution to projects the funder is funding. One funder noted that diversified partnerships and a demonstration of trusted relationships and resilience is important, and another explained that even though they don't require matching funds they do look for broader support from other financial sources such as membership fees, or another funder.

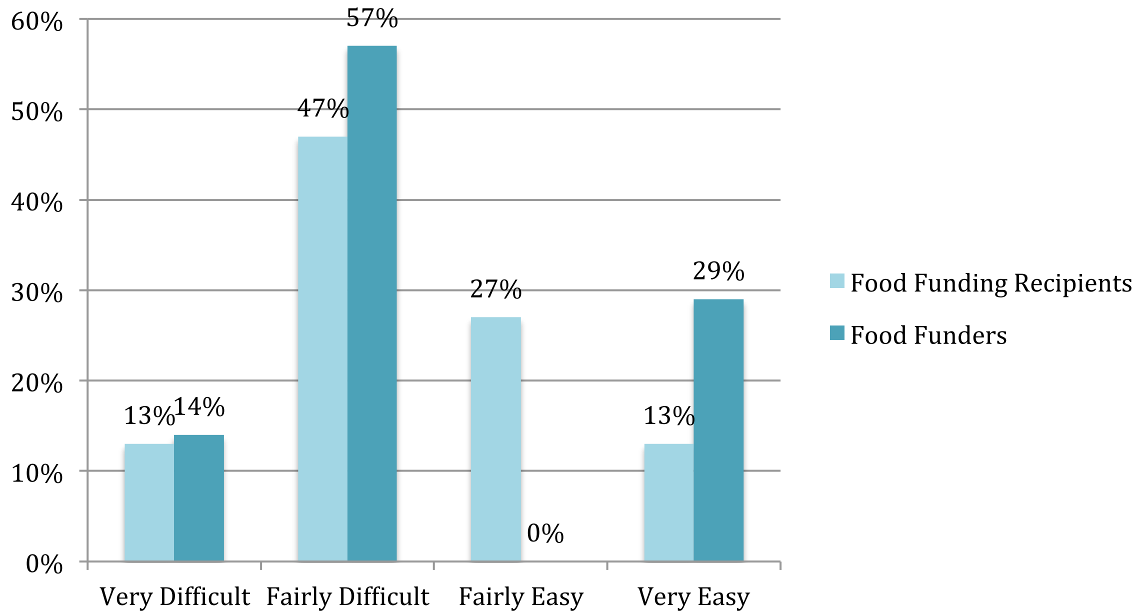
Access to Funding

To assess the accessibility of food funding for grant applicants/ recipients food funding grantees the following two questions were asked:

- To grantees: On a scale of 1-4 (with 1 being very difficult and 4 being very easy) how easy is it for you to access funding for your food projects/initiatives?
- To food funders: On a scale of 1-4 (with 1 being very difficult and 4 being very easy) how easy is it for your food system stakeholders to access your funding?

Figure 9 shows the results of these two questions. Responses show that food funders found it slightly more difficult (either very difficult or fairly difficult) to access funding than did and food funding recipients (60% and 71% respectively). Interestingly, slightly more food funding recipients found it easy to access funding (either fairly easy or very easy) than food funders (40% and 29% respectively). Overall, the perspectives of food funders and food funding recipients on level of ease of accessing funding were quite similar, with the exception of 'very easy' where 16% more food funders thought accessing funding was very easy compared to food funding recipients.

Figure 9: Accessing Food Funding



Food funding recipients and food funders had many ideas as to how the food funding process (includes writing the application and submission) could be made more accessible for applicants. Food funding recipients most commonly noted the provision of a central database that provides information on all food funding opportunities, so that applicants do not have to spend a large amount of time researching individual funding opportunities (n=4). The support of a designated staff person during the application process and afterwards was also noted as a need of food funding recipients (n=4) as well as, a more simplified application process (including online applications that allow you to save your work and continue at a different time and clearly articulated criteria) (n=4).

Other ideas to make food funding more accessible include:

- Distributing funding throughout the province;
- Building operational costs into the funding amount;
- Offering more opportunities for longer term funding over a couple of years;
- Informing non-governmental organizations about funding opportunities through newsletters;
- Include a identified amount of the funding budget that is allocated to food projects or being more explicit in how the funder supports food initiatives;
- An increased understanding that food work is a vehicle to reach multiple goals (e.g. health, education, employment)
- Engaging in consultations with food system stakeholders to learn more about the food system;

- Enhancing the application process by visiting food organizations/initiatives that are interested in applying;
- Hosting competition-style applications, similar to Dragon's Den;
- Being more flexible, not requiring 50% matching funds and recognizing in-kind support; and
- Making the application process less bureaucratic.

When food funders were asked how they believe food funding could be made more accessible for applicants, respondents primarily mentioned being able to meet/speak to potential grantees before they submit a proposal to help identify any questions they might have. Education was said to play a key role in the accessibility of funds. Funders mentioned the desire to have greater knowledge on the food system and ability to share this knowledge with others as well. A need to educate potential applicants about available grants (increase awareness) was also vital.

Overall, the means to make funding more accessible to grantees fall within eight main ideas/strategies:

1. Central database
2. Stakeholder consultation
3. Recognizing in-kind support
4. Simplified application
5. Ongoing communication
6. Competition-style application
7. In-person meetings/visits
8. Knowledge sharing

Perceptions of Food System Change

In addition to sharing their perspectives related to food funding, key informants were also engaged in conversations about their perceptions of creating positive change in the food system. These conversations focused on their perceptions of strengths, weaknesses, barriers and opportunities within Ontario's food system and where they perceived the biggest and most meaningful impact can be made moving forward. The following information provides a qualitative analysis on these conversations.

Strengths in the Ontario Food System

Food Funding Recipients

When asked about the strengths of Ontario's food system, almost half (41%) of all food funding recipients recognized the large-scale production of food for export, such as corn and soybeans, as an area that the province excels in. In addition to different types of food being produced, they noted that various methods of production are being used to grow food in Ontario, including organic methods and the use of greenhouses. A few funding recipients also pointed out that Ontario's food processing sector is a strength of the food system.

41% of respondents identified the province's agricultural land base and farmland as a strength of the food system. They noted that a diversity of people and cultures live across the province. Additional strengths identified include a policy framework that supports local food, producers that are skilled at finding niche markets, a strong tradition of farming, and climates that are suitable for growing, and the sociocultural and legal conditions to produce food.

Ontario has developed a strong culture around local food. People recognize not only local food products but also local food brands; 24% of funding recipients identified the government's Foodland Ontario brand, as one such example. According to respondents, the increased marketing around local food has not only grown consumer engagement in and consumption of local food but also the demand for and access to this food. Culinary tourism was identified as a manifestation of this strength.

Food funding recipients identified the distribution and retail of food as another strength of the food system. The explosion of food-related retail and the development of new distribution and agricultural co-ops were seen as assets in addition to the Ontario Food Terminal, which was noted as a huge asset. It was pointed out that larger restaurants are also starting to support local farmers.

Finally, respondents identified social mobilization around food as a strength. They highlighted community-based food activity (e.g. community gardens), the local food movement, and mobilization around food access, urban agriculture, and the promotion of composting, as examples.

Food Funders

Similar to funding recipients, when asked about the areas of the food system that Ontario is strongest, funders identified both food production and processing as being strengths for the province, most notably around supply-managed commodities, such as poultry and dairy. However, they also noted that the province has a strong niche-processing sector.

Consumer awareness around food in general was identified as strength of the food system; however, 44% of food funders identified a high interest in, awareness of, and demand for local food specifically, as being a strength. Funders noted that a strong local food movement has developed with a diversity of stakeholders, including the Ministry of Agriculture, Food and Rural Affairs, which has a tremendous amount of expertise. Funders expressed that education around food has also grown into a strong suit for the province. Training programs for new farmers, a greater emphasis on food literacy, as well as culturally relevant food and food accessibility programming were all provided as examples.

The ability to produce, distribute and market food, were all identified by funders as areas of the food system where Ontario is strongest. The province's vast agricultural land base was noted as a strength that is complemented by a tradition of farming and a regulatory and policy framework that not only protects natural resources but also supports local food.

Finally, funders identified strong connections and networks between food system stakeholders as a strength in the province's food system. Farmer connections to urban centres and the establishment of food hubs in rural areas were noted as examples of how improved strategies have been developed to distribute and market food while strengthening infrastructure and the supply chain. Funders identified a reliable and efficient retail sector, which markets local food to consumers, as well as a distribution network specific to institutions and restaurants, as both food system strengths.

The following chart summarizes food funding recipients and food funders perceptions of strengths in the Ontario food system (Table 12). For the most part, food funding recipients and food funders agreed on the strengths of Ontario's food system. There are areas where food funders and grant recipients differed on their perceptions of strengths, including perceptions on climate and education. Food funding recipients held that Ontario's climate is a strength whereas funders did not. On another note, funders recognized education as a strength, whereas food funding recipients did not share this perception.

Table 12: Perceived Strengths in Ontario's Food System

Food Funding Recipients	Food Funders
Production and Processing	Production and Processing
Land, Climate and Tradition	Land and Tradition
People and Policy	People and Policy
Food Culture	Food Culture
Alternative Distribution and Retail	Alternative Distribution and Retail
Social Mobilization	Social Mobilization and Education

Weaknesses in the Ontario Food System

Food funding recipients and food funders were also asked to identify areas of Ontario's food system that they perceived to be weak or could use improvement. The following two sections provide their responses.

Food Funding Recipients

The missing middle was identified by 65% of food funding recipients as a weakness of the Ontario food system. They noted that farmers are lacking distribution capabilities, including transportation, and 41% of respondents identified that infrastructure in the middle, between the growing of food and food waste, is missing. Small and medium-sized processors are one example that respondents provided of missing infrastructure in most of Ontario's communities.

The high amount of food insecurity is another weakness that respondents noted. Access to good, affordable, local food is not streamlined, and rural areas are even more limited in their access because of weak distribution. In addition to weak access, funding recipients identified the limited choice of affordable food as a weakness. It was noted that the lack of attention to food sovereignty is a big contributor to the high level of food insecurity.

While the province has a large agricultural land base, "land use" is seen by food funding recipients as a weakness. Municipal government zoning restrictions combined with the destruction of prime farmland through development and the use of prime agricultural land for cash-cropping were provided as examples of poor land use.

A general lack of understanding about the food system, and how its various components interact, was identified as a weakness by funding recipients. This is exacerbated by the fact that conversations between producers and consumers are limited, in part because it is difficult for local producers to market their food. Respondents identified tough regulations and weak local/regional food system policy development as reasons for this communication gap.

Unsustainable agricultural methods were also seen by funding recipients to be a weakness of the Ontario food system. Limited incentives for sustainable agricultural production have widened the gap between small sustainable farms and large conventional farms, and this is in the face of an additional weakness identified by respondents, Ontario's loss of traction in commodity markets like beef.

Food Funders

In addition to identifying that both the aggregation and distribution of local food is a weakness in the Ontario food system, 33% of funders noted that the province has a limited amount of support available to local food producers and small businesses. They highlighted the large gap between small local food businesses and big agricultural business, as evidence of this; pointing out that there are few medium-sized food businesses in the province.

Similar to funding recipients, food funders also identified the high amount of food insecurity as a weakness in the Ontario food system. 33% of respondents noted the need to have more equitable access to food. One funder explained that the food system has been polarized into traditional industrial agriculture or local organic, and this is forcing consumers to make either/or decisions about what they eat. Funders highlighted the province's poor emergency food model and evidence of the negative impacts of food on health, such as the obesity epidemic, as causes and manifestations of food insecurity, respectively.

The consolidation of the food system in Ontario, evidenced by a significant decrease in the number of farms and farmers, was identified as another weakness in the food system. This has created a food system with negative externalities, such as the loss of biodiversity and a large carbon footprint. As a result, the lack of resiliency and use of unsustainable production methods are seen by funders as a weakness.

Finally, food funders saw a lack of communication between and coordination amongst stakeholders in the food system as a weakness. They identified weak supply-chain collaboration and limited communication between stakeholders as reasons why there is no true food value chain, but instead competition between food system stakeholders.

The following chart summarizes food funding recipients and food funders (public and private foundations and provincial government) perceptions of weaknesses in the Ontario food system (Table 13). As can be seen, there are a lot of similarities between food funders and food funding recipients perceptions of the perceived weaknesses in Ontario's food system. Differences can be seen amongst the two groups as food funding recipients noted a lack of understanding of the food system, whereas funders highlighted more so the lack of collaboration within the food system. Food funding recipients also mentioned tough regulation as a weakness, whereas funders did not. This is an important difference as tough regulations can prevent food funding recipients from carrying out the change they want to make; however, if funders do not acknowledge this as an issue it creates a barrier for food organizations to make this progress.

Table 13: Perceived Weaknesses in Ontario's Food System

Food Funding Recipients	Food Funders
Missing Middle	Missing Middle
Food Insecurity	Food Insecurity
Land Use and Unsustainable Production	Land Use and Unsustainable Production
Lack of Communication and Understanding	Lack of Communication and Collaboration
Gap between Small and Large Producers	Gap between Small and Large Producers
Tough Regulation	

Opportunities in Ontario's Food System

Given an understanding of the strengths and weaknesses within Ontario's food system, key informants were asked to identify in what areas they felt the greatest opportunities for food system change exist.

Grant Recipients

Grant recipients widely noted education as an opportunity to create food system change. Education was noted as required in the following areas: zoning bylaws, food policy, individual connection to food through first hand stories, education for small business owners, where to buy locally produced food for residents (e.g. local food maps), food literacy and skills training, the benefits of sustainable agriculture, and training for future farmers.

Providing support, and recognizing, growers in both production and distribution of food was also widely noted. The development of co-ops and hubs at the community level were identified as a means to create this change, as it would aid in keeping locally grown food within the area in which it was grown. It was noted that this opportunity is faced with the barrier of current policies and practices, which support food to be exported out of Ontario, and imported in.

Integrated policy change was seen as a big opportunity for creating change in Ontario's food system. In particular, harmonizing policy to support collective impact was noted as especially beneficial.

Grantees identified a number of opportunities to support local, community level food systems. This involved creating stronger local food systems through working on a community level with community members and leaders, producing food in urban areas, focusing on food production rather than fuel production, supporting the local food system through procurement of local food by institutions and large businesses, and making local food a priority for everyone. The ideas noted within education opportunities and providing support and recognition for growers (above) would also help to create these changes.

Less common responses by key informants, but still possible opportunities for food system change include: developing Ontario's food processing capacity; building capacity and resiliency by using available resources and assets; supporting diverse food business and alternative models (e.g. social enterprise); decreasing the amount of poverty and food insecurity in Ontario; collaboration within the food sector; and paying people a living wage.

Food Funders

To support food systems in Ontario, food funders identified the need to support local businesses as a key opportunity. This includes building relationships between local businesses and local producers and creating more opportunities for residents to support the local food system through their food purchasing.

Greater engagement, participation, coordination, and collaboration among food system players (including funders) were noted as a big opportunity to create change. Interviewees noted that individual parties tend to act in silos, and by working together there will be an increased ability to create systems change (for example, through collective advocacy efforts. As with food funding recipients, education and creating opportunities for shared learning was viewed as an important opportunity. Respondents stated a need to focus on educating people about struggles within their local food system, education (and recruitment) about careers in agriculture, and sharing knowledge of food system stakeholders.

Other noted opportunities by food funders include: implementing community-based work through grassroots organizations; capitalizing on the demand for ethno-cultural food by introducing producers to new markets; increasing urban agricultural capacity; taking advantage of time periods when the government is sympathetic to local food; and calculating the true costs of food production, so that the negative externalities of sustainable and unsustainable practices can be compared to one another and therefore, better understood.

While many of the opportunities, broadly defined, show similarities between food funding recipients and food funders, where they tend to differ is the means by which they see these opportunities manifesting. For example, funders focused on the need to educate people about careers in agriculture and what they can offer whereas food-funding recipients focused more so on providing educational training opportunities for people who had already started farming. The similarities and differences between the two groups perspectives on opportunities for food system change are provided in Table 14. Once again, it appears that food funding recipients see policy change as an important avenue for creating change, but the influence of policy change was not acknowledged by funders.

Table 14: Opportunities for Ontario Food System Change

Food Funding Recipients	Food Funders
Education	Education and Knowledge Sharing
Alternative Food System Recognition and Support	Alternative Food System Support
Increasing Production and Consumption	Increasing Production and Consumption
Community-based Work	Community-based Work
Collaboration	Communication and Collaboration
Policy Change and Harmonization	New Markets (e.g. ethno-cultural food)

Barriers in the Ontario Food System

Where there are opportunities for change, there are often barriers. Key informants were asked to identify where they felt the greatest barriers lie to creating change in the Ontario food system.

Grant Recipients

The most commonly noted barriers to food system change by grant recipients include struggling farmers, our three-tiered government, and a lack of knowledge, coordination and collaboration amongst food system actors. More specifically, farmers were noted as struggling to enter into agricultural careers despite the fact that the average age of farmers is increasing. The high cost of farmland, difficulty accessing land, and a lack of skilled labour were mentioned as the main barriers people face when trying to become a farmer. Food funding recipients perceived a lack of connection between Canada's three-tiered government system as creating a barrier. It was perceived that the levels of government prioritized different issues, making it hard to address challenges within the food system. Additionally, a lack of knowledge and education also creates a barrier. Key informants noted that city officials are unclear about how to support local food systems, the general public doesn't know a lot about the business of farming or how the food system works, and there is limited knowledge of how to market local food. The lack of marketing expertise for local food leaves people with a lack of appreciation for local food, specifically the amount of work that is required from field to store. This lack of understanding leaves many with the belief that local food should be cheaper than it is being sold for.

Another perceived barrier is that the control of the food system lies within big agriculture and therefore, there is pressure to scale up operations, even when it is not always possible. Some felt that there is a lack of focus on processing and growing produce (fruits and vegetables rather than raising animals). Some felt that there were unclear rules and regulations, specifically in relation to environmentally sustainable practices and defining "locally produced" food. The lack of clarity fosters green-washing and local-washing where people claim products were produced using sustainable practices and/or produced locally when they actually were not.

Another barrier to change was getting policy amended and/or new policies created. Food funding recipients explained that it is very difficult to influence policy; it's a slow and daunting process. Without leaders to champion policy change, and educate people about the need for policy change, the change needed in the food system is not going to happen. Recipients noted the need to proactively address policies in need of reform or replacement, rather than waiting for the general public to change their own opinions (for example, the need to "inspire change" was echoed, rather than "waiting for change" to happen).

Food Funders

The most frequently mentioned barrier pertained to a great deal of support for large-scale players in the food system, and a lack of support for small-scale players.

This was noted in terms of regulations that support large-scale players, thereby making it difficult to support local food systems. This is similar to a barrier food funding recipients made note of – that the control tends to be in the hands of big agriculture and big business. Also similarly, food funders mentioned that the lack of communication between food system stakeholders across sectors was a big barrier to food system change. There's also a lack of knowledge of the various local food system assets within each region; an awareness of the assets would help to address the challenges being experienced within the region.

Interestingly, other than the two barriers just mentioned, food funders identified many different perceived barriers to food system change (see Table 15). The rising increase in food costs was a barrier but it's also a barrier to sell food at too low a cost as it's not economically sustainable for producers. The tendency to think about issues from a narrow-minded perspective, rather than from a systems/holistic thinking perspective was also seen as a barrier because it prevents the issue from being resolved and doesn't include all of the key players in the resolution. In some places in Ontario, there aren't enough people in each region to support multiple projects simply because of the way the population is distributed geographically.

Many food funders articulated that there is not enough involvement/capacity in advocacy efforts focused on key issues within the food system. Some agencies were viewed to be too conservative in nature and therefore, hesitant to engage in politics. Other organizations were known to be regulated by the Canadian Revenue Agency (CRA) and therefore, could not engage in advocacy efforts to the full extent that they may like to. For some of these organizations, the restrictions put in place by the CRA were intimidating and therefore, next to no advocacy efforts were taken on by the agency – the "charity chill" effect. Regardless of why people were not participating in advocacy efforts, the overall perspective of food funders was that there wasn't enough effort being put towards this activity.

Table 15: Perceived Barriers to Food System Change

Food Funding Recipients	Food Funders
Lack of Knowledge and Collaboration	Lack of Knowledge and Communication
Regulations	Regulations
Limited Distribution and Processing	Diffuse Population
Greenwashing/Localwashing	Linear Thinking
Policy Change	Limited Advocacy Capacity/Ability
Poverty	Food Costs

Moving Forward Towards Future Impact

Considering the strengths, weaknesses, opportunities and barriers within Ontario's food system, food funding recipients were asked which areas of the food system they believe funders should concentrate on moving forward in order to create impact in the future. Similarly, funders were asked where they thought they could have the greatest impact in the future. These perspectives are captured below.

Food Funding Recipients

When questioned about areas of the food system that funders should concentrate on most, a number of food funding recipients indicated that supporting systemic change should be a top priority. For funders to have the largest impact in this area, respondents suggested that they would need to support existing local food system initiatives in addition to new projects at the community level, and core funding was given as an example of how to do this.

Networking is another area funding recipients suggested that funders concentrate on most. Respondents identified the creation of networks between food system stakeholders, and supporting many small organizations rather than a few big ones, as key to the realization of longer-term visions for Ontario's food system.

Food production was noted as another area where funding could have a future impact. New, small-scale, and alternative food producers were identified as groups that require the most support; however, supporting existing farmers transition from cash-cropping to sustainable production was also noted as an area that funders could make a difference. In addition, funding recipients suggested that funders should concentrate on building capacity in the food system. Researching food system development, strengthening the skills and abilities of food system stakeholders, and supporting young entrepreneurs and farmers, were all identified as ways that funders could build capacity in the food system. Supporting incubators and funding projects that get young people onto the land were two examples provided by respondents.

Health and education were both identified by food funding recipients as areas where funders could also have a large impact on Ontario's food system. Funding projects that educate the consumer and build awareness around healthy food and cooking, as well as, supporting targeted nutrition and health work and projects that create good food opportunities for the most vulnerable, were provided as examples of how funders could make a difference. In addition to growing awareness around and the demand for fresh local food, funding recipients suggested that food funders' concentrate on supporting the marketing of fresh local food to consumers. This could involve funding larger projects in the middle of the food system that assist local producers in distributing their food, as well as, supporting smaller local food projects, such as farmers' markets.

Food Funders

When funders were asked about the areas of Ontario's food system where they could have the largest impact, infrastructure development was at the top of the list. Funding the development of food hubs was one example of an infrastructural project that could make a difference. Similar to food funding recipients, funders identified small-scale local food production and micro-food project development as areas their funding could have large impacts on in the future. Additionally, cultivating the demand for local food was another area that funders suggested they could concentrate on. In general, funders noted that supporting areas that focus on sustainability and collective impact were likely to have the largest impact.

Conclusion

The purpose of this report was to analyze the food funding landscape in Ontario from the perspective of those working on food projects (food organizations) and those funding the work. Through the use of an online survey, a report from the Canadian Food Funder collaborative, and key informant interviews, information was gathered on funding practices, granting experiences, and creating change in Ontario's food system. Overall, there was a high degree of alignment among funding and grant recipients as to the change they want to see. Identified opportunities for food system change include infrastructure to address the missing middle, sustainable agriculture, food literacy, training and education, marketing and consumer awareness, policy change, supply chain collaboration, collective impact and systems change, among others. While policy change was an important opportunity identified by food funding recipients, there were identified barriers to capitalizing on this opportunity. Funders are reluctant to support advocacy efforts and charities are reluctant to engage in advocacy, even though policy and regulatory change is a key opportunity in creating a healthy, sustainable and local food system in Ontario.

There were a number of opportunities identified throughout the report to achieve greater alignment amongst grantees and grantors. Aligning funding dollars with food system work is one avenue. Under-funded areas of food system work identified in this report include regulation and policy, health and nutritional quality of food, food access and nutrition, food distribution and storage, and energy. There was also an identified need for funders to support food projects to continue or scale up, rather than focusing on new projects and/or funding for very short periods of time (70% of grants are for a year or less). The granting process was also seen as an area in need of improvement. Both funders and grantees identified a need for more consultation between the two groups during the application process, in order to ask questions and get a better understanding of the project and expectations.

In order to achieve greater alignment within the food sector, there needs to be on-going conversation amongst the different parties. There is an important opportunity for coalition building, where foundations, governments, and Ontario's food movement come together to share their unique knowledge and expertise with one another. The opportunity to share knowledge was expressed as beneficial by both food organizations and food funders, and moving forward, should be capitalized on.