



Colorado Blueprint of Food and Agriculture: Synthesis of Community Engagement Townhalls

A unique opportunity to strengthen key food and agricultural sectors through stakeholder conversations that explore opportunities for food-systems led community and economic development across Colorado

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- The **Colorado Department of Agriculture** works to strengthen and advance Colorado Agriculture; promote a safe and high-quality food supply; protect consumers; and foster responsible stewardship of the environment and natural resources.
- The **Colorado Food Systems Advisory Council** works to advance recommendations that strengthen healthy food access for all Coloradans through Colorado agriculture and local food systems and economies.
- The **Colorado State University Agricultural Experiment Station** conducts research that addresses the economic viability, environmental sustainability, and social acceptability of activities impacting agriculture, natural resources, and consumers in Colorado.
- The **Colorado State University College of Agricultural Sciences** speaks to our institution's land-grant mission through its economic impact, cutting-edge research, and innovative education.
- **Colorado State University Office of Engagement** connects communities around shared solutions through education, research and leadership.
- **Colorado State University Extension and Outreach Food System programs** engage Colorado communities through county-based agents, regional specialists, and Extension faculty. We support community-based organizations, connect stakeholders to state and federal resources, and assist in developing local and regional supply chains.
- **LiveWell Colorado** increases access to healthy eating and active living by removing barriers that inequitably and disproportionately affect low-income communities and people of color.

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Background on the CO Blueprint

During 2017, Colorado agricultural and food system stakeholders were invited to help frame, guide and innovate a Blueprint for the sector's future. Understanding key assets, emerging issues and priorities for future investments and policies enable us to sustain the state's standing as a global leader in production and processing, while maintaining the culture of health, quality of life, and livable communities valued by both its long-time residents and those who choose to move to Colorado as their new home. This Blueprint process offers a unique opportunity to strengthen key food and agricultural sectors through stakeholder conversations that explore opportunities for food-systems led community and economic development across Colorado.

The Blueprint was guided by key food and agricultural organizations who came together to guide a process culminating in a shared vision for the future of Colorado's food system. The groups include:

- Colorado State University Agricultural Experiment Station and Research Centers,
- Colorado Food Systems Advisory Council,
- Colorado Department of Agriculture,
- Colorado State University College of Agriculture,
- Colorado State University Office of Engagement and Extension,
- LiveWell Colorado and
- Colorado Food Policy Network.

The goals of the CO Blueprint of Food and Agriculture include:

- Understand opportunities and challenges resulting from changing public attitudes about agriculture and food;
- Assess opportunities for Colorado food system policy to address challenges and needs;
- Document, assess and highlight key linkages in Colorado's food supply chain, its key players and infrastructure;
- Develop priorities for capacity building, investment and innovation across Colorado agriculture and food stakeholders; and
- Enhance CSU's knowledge of Colorado-specific research and engagement needs to support opportunities for all research and outreach units (on and off campus)

Community Engagement Process

To validate and enhance findings compiled from available secondary data, the Colorado Blueprint of Food and Agriculture also included an extensive public engagement process. To assure geographical representation, the above-mentioned key organizations divided the State into nine regions, loosely based on the location of the state's agricultural experiment stations/research centers, plus several additions to ensure representation of all corners of the state (see Figure 1). Nine regional advisory teams were assembled to identify previous food system assessments, engage important regional stakeholders and voices, and help coordinate a regional townhall meeting. The regional advisory teams included representatives from the Agricultural Experiment Station, Colorado State University Extension, Colorado's Food Policy Network, and the Colorado Food Systems Advisory Council.

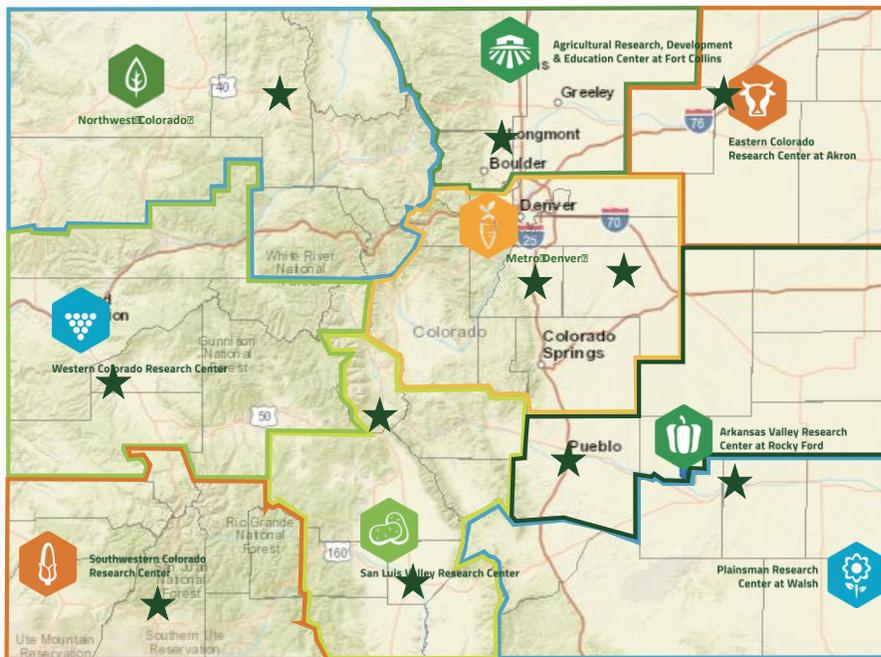


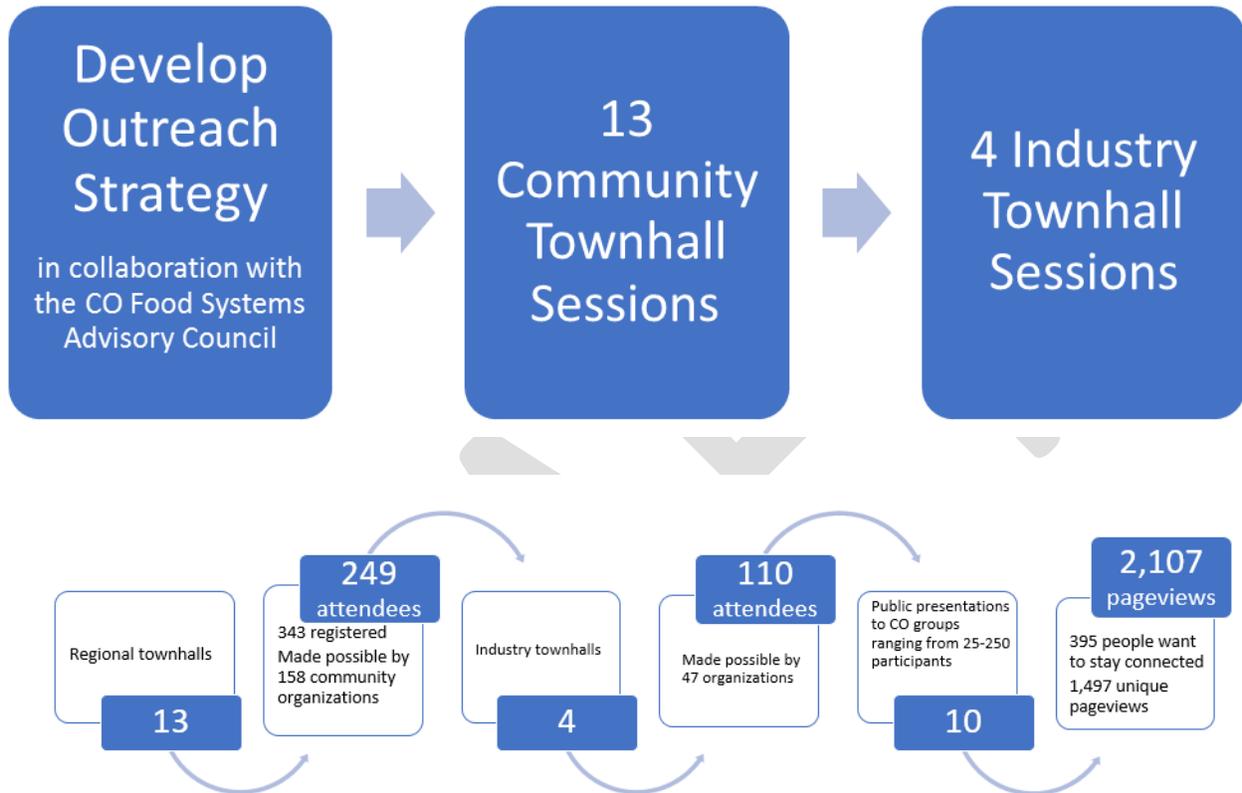
Figure 1. Map of the nine regions, including the locations of each of the Blueprint Townhall meetings.

For each of the townhall meetings, members of the regional advisory team were asked to select up to four key, cross-cutting issues that influenced, but transcended, any one industry sector across the food system. These could be topics on which the regions were already working or areas they saw as key opportunities to address (for example, workforce development and retention to support the next generation of agriculture). These issues were used to guide the townhall discussions. Below summarizes the selected cross cutting issues and opportunities by region:

- Access to healthy food (all regions)
- Institutional food procurement (Western and Northeast)
- Access to land and/or water to support the food system and next generation (Southwest, Gunnison, Front Range, Southeast, Denver, South Central)
- Opportunities and challenge to support food system infrastructure (Southwest, Gunnison, Front Range, Denver, Northeast, Northwest, South Central, Southeast, Western, Eastern)
- Value of agriculture beyond the dollar value (Southwest, Gunnison, Denver, Eastern)
- Leveraging federal resources (Northwest)

In total, almost 249 people attended 13 regional townhalls, representing 158 organizations across the state. In addition, 4 industry townhalls were held with over 110 attendees, representing 47 organizations. And, 10 public presentations, each of which included 25 to 250 participants helped to spread the word about the process. As evidence of the interest in the

process, 395 individuals asked to stay connected to what was happening with the Blueprint, 1,497 unique page views were recorded on the project website, with a total of 2,107 total views between January and December 2017, from 93 different communities across Colorado. At the presentation of the draft report at the CSU Ag Innovation Summit in September 2017, we had nearly 100 attendees. In addition, 74 people provided public comments via our online system.



Stakeholders who attended the regional townhalls include a broad range of job or personal affiliation categories, including: media, healthcare, funder, student, food industry intermediary, food retailer, planner, educator, University personnel, rancher, farmer, public health personnel, government professional, Extension specialist, food service provider, and non-profit staff.

Data Analysis



Based on the extensive outreach and engagement process, we classified recommendations and priorities under the umbrellas of eight areas of opportunity, these include:

1. Create, retain and recruit agricultural and food firms;
2. Develop workforce and youth to support agricultural and food sectors;
3. Promote the Colorado brand, ensuring it reflects the unique qualities of the agriculture and food sectors;
4. Support a business- and consumer-friendly regulatory environment;
5. Address how scale impacts market performance, access, and opportunities;
6. Innovate and support new technology for agricultural and food businesses;
7. Improve access to resources and capital for agriculture and food firms; and,
8. Integrate agriculture and food with healthy, vibrant communities.

Create, retain, and recruit agricultural and food firms

In an increasingly competitive global economy, attracting and retaining businesses and talent are key. In 2015, Colorado was the second fastest growing state, including net migration of over 70,000 individuals. The majority of these individuals are settling along the Front Range, which is also where most of the state's food businesses are located. Though this presents an opportunity to support the state's metro-based food businesses, the skills, education and location of new Coloradans may not adequately meet the workforce and labor needs of the state's farmers and

ranchers that are located in more rural counties, many of which lost population between 2010 and 2015 (particularly the Southeast, Northeast, and Northwest).

Under the umbrella of creating and retaining agricultural firms, three key areas of opportunity were identified through the regional townhalls: 1) cooperative efforts and fuller utilization of infrastructure and assets; 2) market and tax incentives to target early-stage farm and food business development; and, 3) customization of business programs and technical assistance in recognition that farms, ranches and firms in different places face different barriers to success.

1. Cooperative efforts and fuller utilization of infrastructure and assets.

Substantial opportunities exist to strengthen business-to-business linkages both within sectors as well as across sectors, which could serve both to improve the profitability of farms and ranches and agri-food businesses, as well as to strengthen regional economies. Within-sector opportunities could include shared coordination of distribution services (farmers mentioned challenges with cost and availability of distribution in several regional townhall meetings that were not proximate to Denver). Across-sector opportunities could serve to exploit areas where Colorado is already a leader (for example, in the natural food, fast-casual, and livestock sectors), and better link in potential input supplying agricultural and business service firms.

An important component of this opportunity includes highlighting key community assets that could be used to strengthen within- and cross-sector linkages. Figure 2 is a map of existing meat, poultry, dairy and food processing/manufacturing firms in the state that currently purchase items from and/or manufacture items for Colorado farms and ranches. Increasing utilization of existing infrastructure can help to ensure the long-term viability of these businesses, manage start-up capital risk for new, entrepreneurial firms, and support rural and regional economic development. For example, hunting/domestic processing is often seasonal. Through enhanced collaboration between hunters, ranchers, and guides there may be opportunities to strengthen and diversify revenue streams for both small and mid-scale meat processing facilities while supporting the outdoor recreation and ranch-based tourism sector. Additionally, some land and water assets are underutilized, and could be leveraged to support new or more profitable farming and ranching operations.

Food Processing Permits 2016

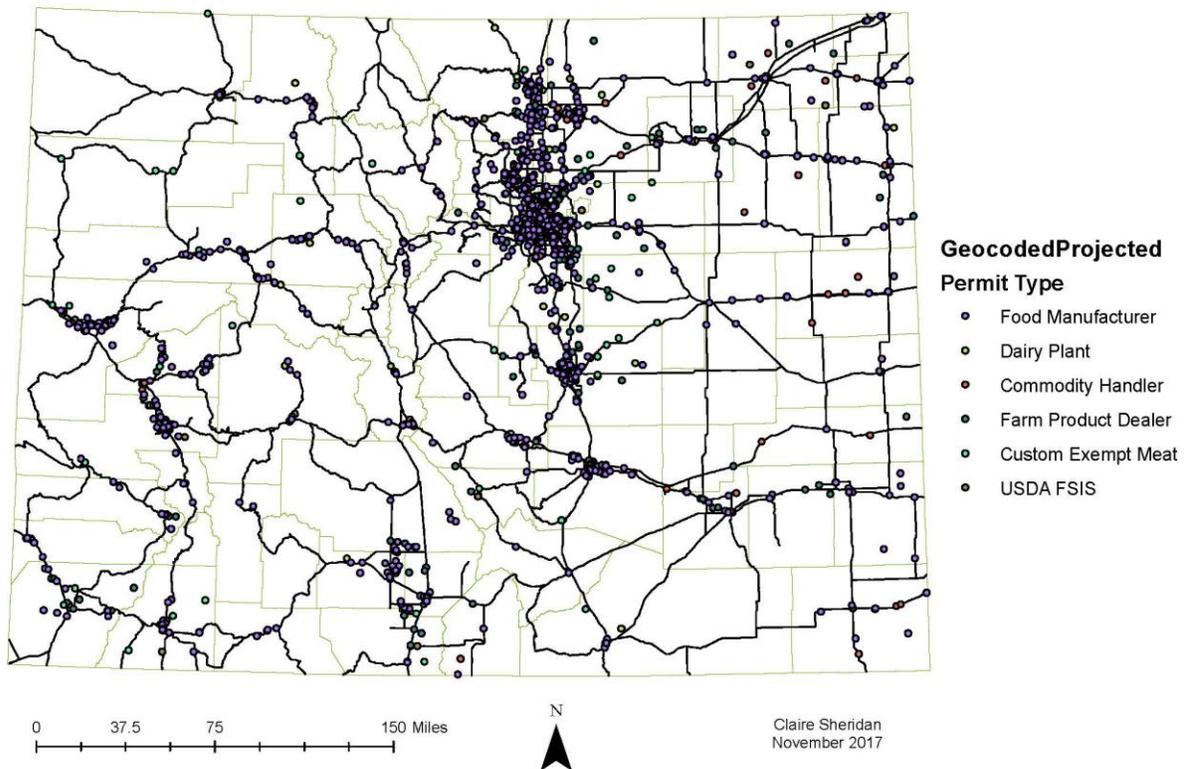


Figure 2. Map of meat and poultry, dairy, and food processing/manufacturing firms in Colorado that purchase product and/or manufacture items from Colorado farmers and ranchers.

Action items:

- Create and continually update a database of existing agricultural and food supply chain firms and integrate the information into a visible and navigable web-based platform.
- Develop cooperative knowledge sharing, network programming and events across the food system.
- Encourage existing farmers and/or land owners to lease underutilized property to Young, Beginning, or Small (YBS) or veteran producers.
- Engage OEDIT to take a more active role in matching infrastructure assets to food businesses, particularly in rural parts of the State.
- Streamline the regulatory and paperwork burden of food supply chain co-packing relationships in the State.
- Encourage fuller utilization of existing infrastructure before providing tax incentives or other public support for new brick and mortar investments.

2. Frame zoning, market, and tax incentives to target early-stage farm, ranch and food business development

Opportunities exist across the state to leverage the buying power of state institutions and retailers to support early-stage farm, ranch and food businesses. As an example, Colorado has several school nutrition programs including the afterschool snack program, the fresh fruit and vegetable program, the national school lunch program, the school breakfast program, the special milk program, and the summer food service program. The Colorado Department of Agriculture already works to support several of these programs through its school meal day, where Colorado Proud items are featured on school menus across the state (see Figure 3). These programs could begin and/or strengthen their current marketing efforts regarding purchases sourced from start up, veteran, and beginning farmers, ranchers, and food businesses throughout the school year.

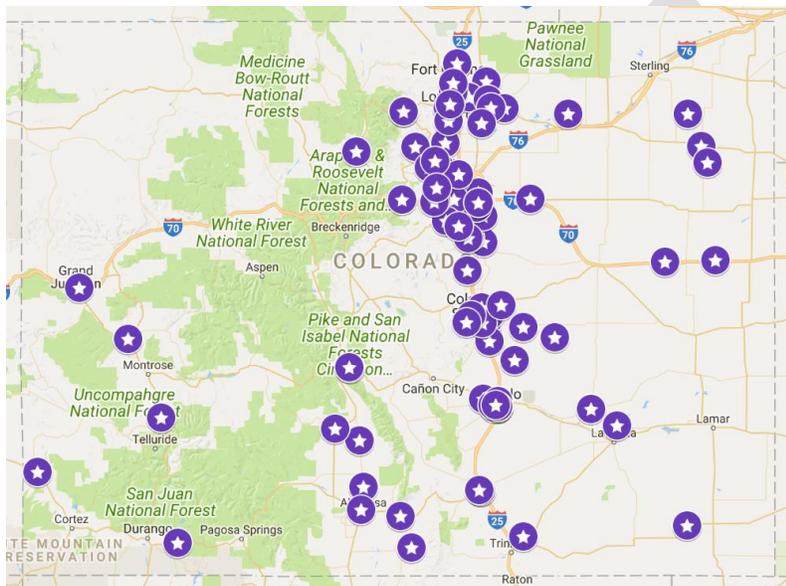


Figure 3. Map of schools that participated in 2016 Colorado Proud School Meal Day.

Action items:

- Work with retailers and government food procurement policies to feature beginning and veteran farms/ranches and emerging food businesses in their buy local promotion programs.
- Create a portfolio of government-based incentives that support Colorado farms and food businesses, but also serve other public interests garnering strong citizen support – leasing land, donations to food relief organizations, agricultural utilization of open space.
- Develop markets (including local procurement by public entities) and increase access to existing markets with promotions that benefit early-stage farm and food businesses and reflect local conditions.

3. Customize business programs and technical assistance in recognition that different places face different barriers to success

Food systems and agricultural economic development efforts cannot be one size fits all across the state. Colorado is extremely diverse; microclimates, transportation, and demographics are all major drivers of agricultural and food system market performance. More work is needed to provide communities with data and information necessary to make educated investments and decisions regarding their unique food and agricultural systems. Further, there is substantial opportunity to better communicate and appropriately match supply and demand across urban and rural regions of the state. Colorado is perhaps unique in that its population is so concentrated in one region of the state (see Figure 4). This population density could be better leveraged to establish market opportunities for farms and ranches, therein reducing transportation and other transaction costs.

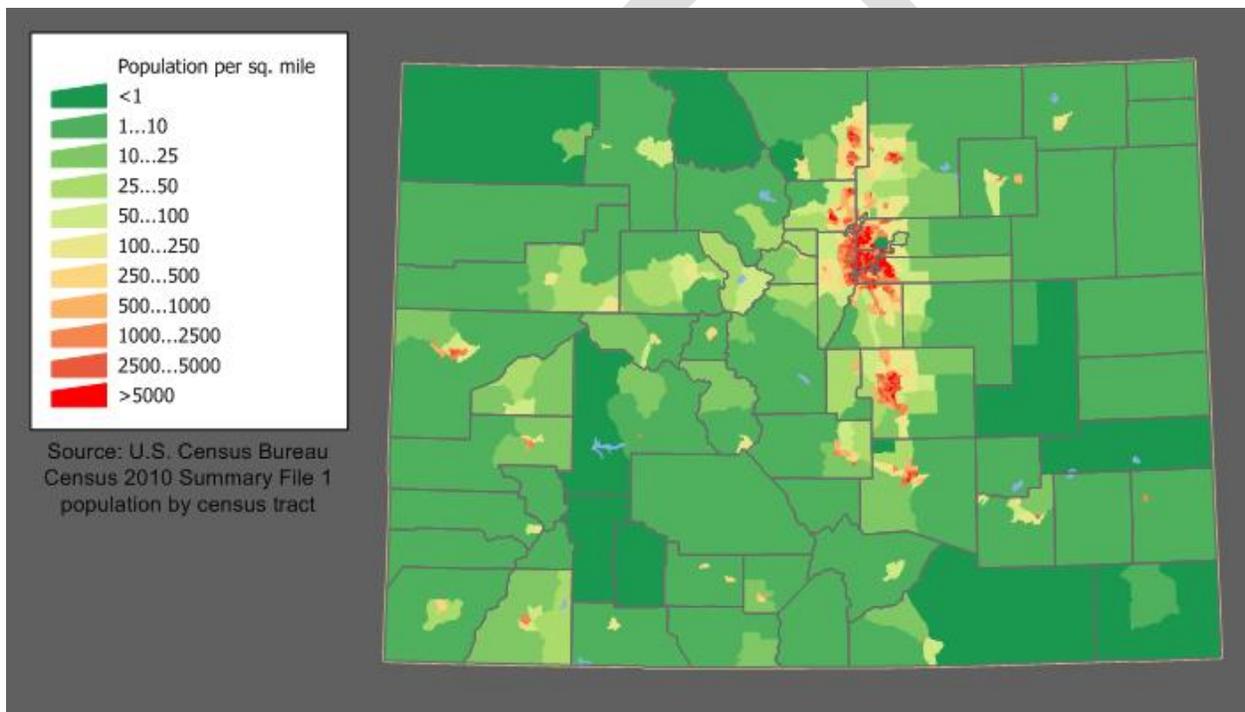


Figure 4. Population density map, Colorado.

Action items:

- Work with DOLA and other county, regional, and statewide planning and economic development offices to target agricultural and food system interventions likely to work in their community.
- Conduct a feasibility study of establishing public markets in Denver and Colorado Springs (and other population centers) that focus on showcasing Colorado agriculture, including its heritage.

- Assess the potential to bring short- and mid-haul rail transport back in key parts of the state, including support for shared aggregation and marketing to achieve greater economies of scale.
- Encourage existing and new industry associations as business capacity builders, resources and champions for business stakeholders (e.g., CFVGA, Colorado Cattleman’s Association, Colorado Corn Growers Association).

Develop workforce and youth to support agricultural and food sectors

In 2015, Colorado experienced net in-migration of 68,000 people. Most of these people are locating along the Front Range, and have had little to no exposure to the state’s unique agriculture or the food system, other than as eaters (see Figure 5). Developing the workforce and youth to support food and agricultural sectors requires exposure to these sectors, and knowledge that they present opportunities for viable careers. Luckily, Colorado has vibrant Future Farmers of America (FFA), 4H, Colorado Young Farmer Education, Colorado Ranching Legacy, Beginning Farmer and Rancher, and Colorado Association for Career and Technical Education programs. Opportunities exist to ensure these organizations and programs are working together, leveraging resources, expertise, and opportunities.

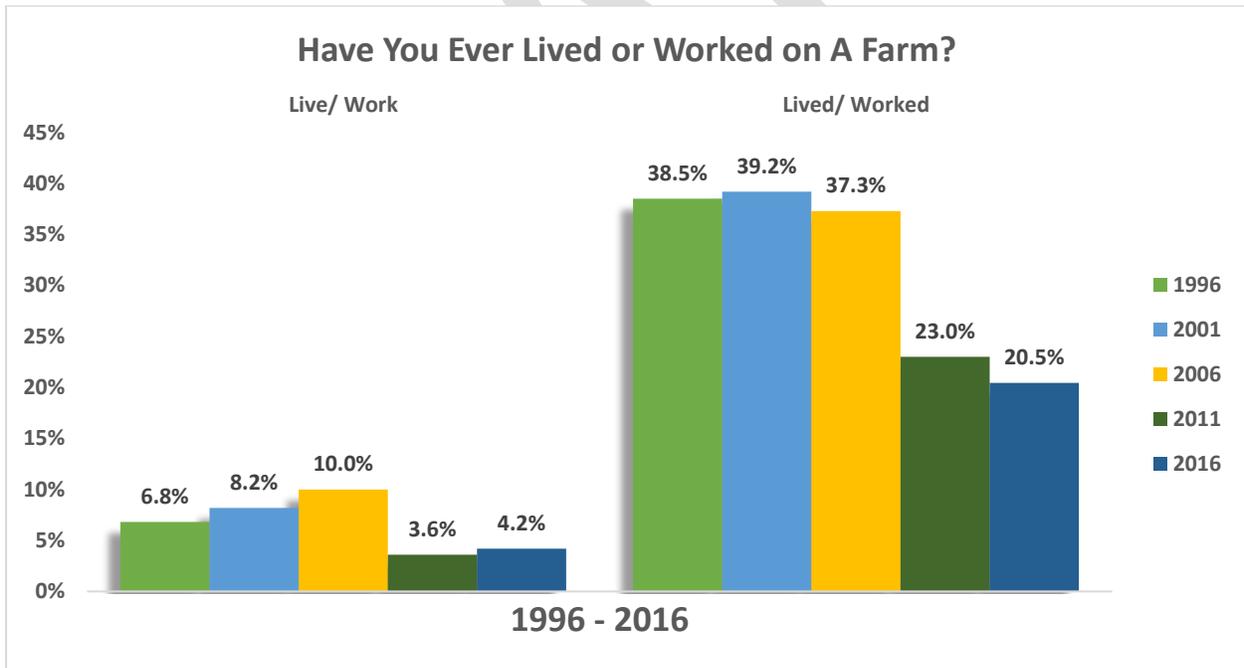


Figure 5. Percent of respondents to the CO Public Attitude’s Survey who have ever lived or worked on a farm, 1996-2016.

Under the umbrella of developing workforce and youth to support the food and agricultural sectors, three key areas of opportunity were identified through the regional townhalls: 1)

develop and promote agricultural and food curriculum well suited for all stages of education; 2) support innovative educational approaches to transitioning workers into agriculture across all life stages; and, 3) strengthen connections between allied youth development and workforce programs.

1. Develop and promote agricultural and food curriculum and life skills well suited for diverse learners and all stages of education.

Throughout the listening sessions, stakeholders espoused the benefits of innovative 4H and FFA programming. Yet, there remain opportunities to expand these programs, as well as to integrate more widely scoped, food systems programming. As an example, experiential learning opportunities could bridge greenhouse production, small-scale food manufacturing, and culinary arts curriculum. 4H, FFA, and agricultural education more broadly provide important opportunities to highlight connections to STEM and careers in the agricultural or food sectors, including the development, manufacturing and operation of emerging ag technology. As several stakeholders pointed out, agricultural education is STEM education.

Action items:

- Expand 4H and FFA programming to nontraditional agricultural regions/households including urban and underserved communities, and developing and integrating curriculum that aligns with employment trends in the food industry.
 - Support FFA and 4H programming that prepares youth for careers in ag technology.
 - Explore how Colorado Education Standards could integrate knowledge of food systems in science and social studies content areas.
 - Invest in more widely scoped food systems based training programs in high school as well as at the community college and University levels.
 - Expand farm to school programming throughout the state, integrating food systems education.
2. Support innovative training, outreach and continuing educational approaches to transitioning workers into agriculture in all life stages

Much of the focus of agricultural workforce development is on youth, however many new farmers, for example, are not young. Opportunities exist to expand farmworker training and beginning farmer and rancher programs to midcareer professionals. Further, there has been a proliferation of support programs – including mentoring, incubation, apprenticeships, and rehabilitation services. For example, Fort Lewis College started a Market Garden Incubator in 2009. Since its inception, 9 farms have graduated from the program, with 5 current farmers. In addition to the incubator, there is also a farmer in training program to support those who need more business skills before starting their own farm. There have been several attempts to replicate this successful model, yet more information is needed to understand how to best tailor these programs based on regional needs, existing market stakeholders, demographics, and

climactic conditions. More evaluation is needed to assess outcomes associated with these programs so that effective, targeted investments can be made.

Action Items:

- Assess the outcomes from mentoring, incubation, apprenticeship, and rehabilitation programs to identify best practices and remaining gaps. Assessment should include understanding of ongoing programs outside the state that could be replicated in Colorado.
- Expand farmworker training and beginning farmer programs – including beginning, midcareer and advanced programs, as well as those that support urban agriculture and veteran training.
- Create more opportunities for new farmers and ranchers to serve on Boards and in key leadership posts as a form of professional development. This should also include education these producers about the importance of engaging in the policy process.

3. Strengthen connections between allied youth development and workforce programs

Many of the students who are involved in the state’s natural resource or recreational programs may have interest in agriculture. Opportunities exist to leverage these ongoing programs to introduce participants to agriculture, rural development, and the food system. For example, students working with the Conservation Core focused on a natural resource project experienced and recognized the value of their work to agricultural practices. This type of exposure may nurture greater interest in working on a farm. Likewise, workforce programs for veterans as well as for inmates in correctional facilities are starting to integrate greenhouse production. Understanding if these nontraditional workforce programs result in on-going agricultural careers is important moving forward.

Action items:

- Develop projects and programs that would introduce those with only minimal background in agriculture, but with allied interests, to career opportunities in agriculture and food systems.
- Assess how ongoing correction facilities vocational programs (including those in Pueblo, the Northeast, and Canon City) have met current labor needs, and prepared those released from facilities to have career opportunities in the agricultural and food sectors.
- Support additional career guidance and technical assistance to access available federal educational resources and workforce training opportunities for veterans in the agricultural and food sectors.

Promote the Colorado brand, ensuring it reflects the unique qualities of the agriculture and food sectors

The Colorado brand is strong! The Colorado flag, for example, is ubiquitous. The Colorado tourism office reported that in 2015, for the fifth year in a row, Colorado broke its own previous record for the number of tourists – 77.7 million visitors to the state. However, awareness and purchasing of some Colorado agricultural products among tourists and our own citizens vary. Figure 6 presents results from the Colorado Public Attitudes Survey, showing that awareness level and purchasing of key agricultural products varies by product in the state. For example, over 70% of respondents reported purchasing Palisade peaches, compared to Colorado lamb at about 20%.

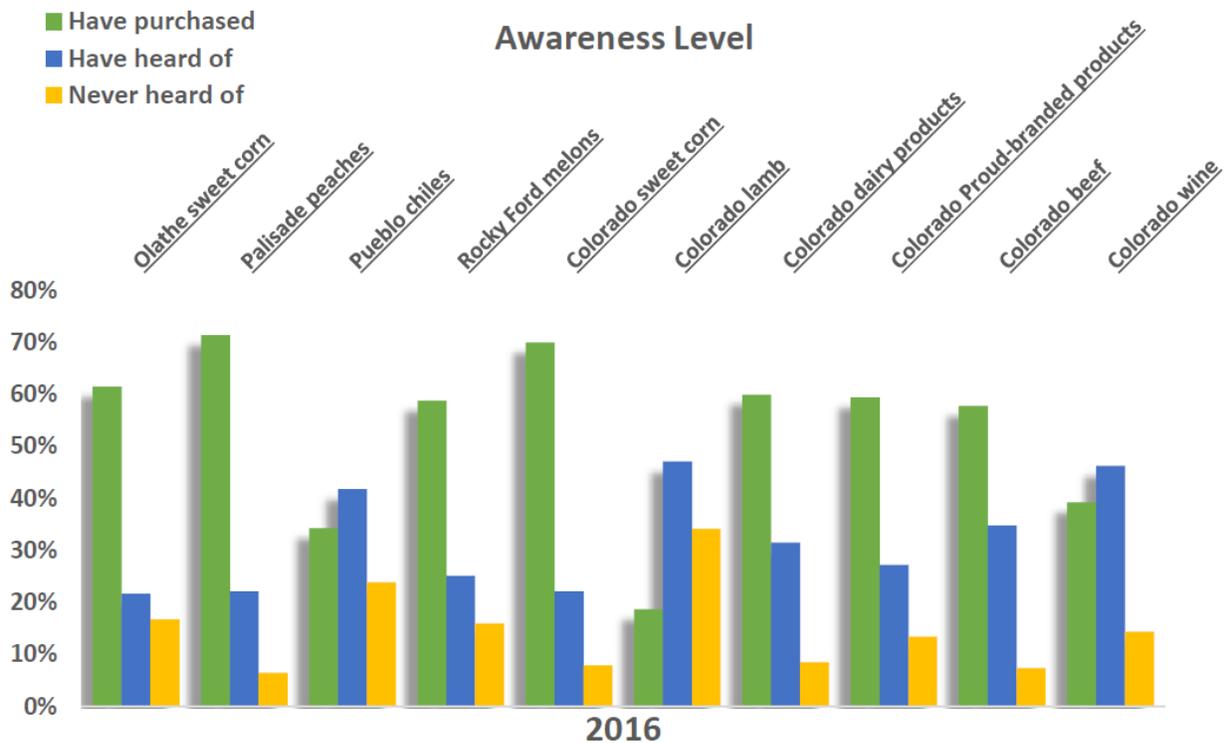


Figure 6. Awareness level of key Colorado agricultural products, 2016.

Under the umbrella of promoting the CO brand and ensuring it reflects the unique qualities of the agriculture, food and beverage sectors, three key areas of opportunity were identified through the regional townhalls: 1) promote Colorado food and agricultural businesses through developing market opportunities; 2) better position Colorado agricultural and food firms to exploit changing consumer and market trends; and, 3) support enhanced consumer education around the CO brand.

1. Promote CO food and ag businesses through developing market opportunities

Many opportunities exist to better unite the state’s rural, agricultural regions with the majority of the state’s inhabitants who mostly reside along the urban Front Range through developing market opportunities. These market opportunities can be located in urban places, or involve promoting agritourism and other occasions for urban inhabitants to travel to rural regions (see Figure 7). There are many benefits to agricultural and value added businesses associated with agritourism, for example, 1) consumers are often willing to pay a premium for items purchased at the farm or at a food/agricultural festival compared to in a retail grocery store, and producers generally receive a larger share of the retail dollar at these venues, 2) urban consumers learn more about rural regions and agriculture through these visits, and there is evidence that this may make them more willing to support agricultural and broader rural issues in the future, and 3) urban consumers may be more likely to purchase these Colorado branded food and agricultural products at urban retail stores in the future.

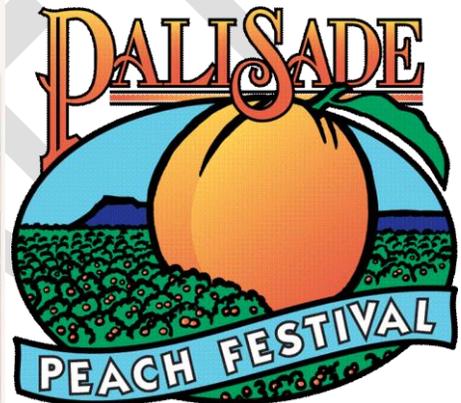




Figure 7. Examples of agritourism promotion efforts in Colorado’s agricultural regions.

Action items:

- Promote regional food festivals through regional and statewide tourism offices throughout the state, nationally, and internationally, including a matching grant program for destination development
 - Invest in targeted agritourism promotion to outdoor recreation tourists, second home owners and retirees, and those interested in the heritage of Colorado as a promotional and educational tool.
 - Support and enhance buyer-grower roundtables, as well as food and agricultural trade shows across the state, especially for retailers interested in promoting and featuring Colorado branded products through visible, year-round retail displays
2. Better position Colorado agricultural and food firms to exploit changing consumer and market trends

There is strong evidence of growing consumer demand for products that are differentiated in the market place. Product differentiation can make a product more attractive to a particular market, differentiates it from its competitors, and can result in a premium price. For example, organically produced goods continue to show double-digit growth and are now available in nearly 20,000 food stores, including 3 of 4 conventional grocery stores. In fact, in 2014, Colorado was one of the top states in organic sales, with \$147 million. Similarly, global sales of gluten-free food

increased 12.6 percent in 2016 to \$3.5 billion. Colorado is the largest grower of millet in the U.S. (a gluten free food), annually producing half of all the millet. However, much of Colorado's millet is not currently grown for human consumption (a higher value market), representing an opportunity to increase awareness among producers of changing consumers demand and connecting retailers with producers.

Action items:

- Investigate the potential of a transparent, strong, and clear brand/message for CO grown and processed products.
- Create business development programming to support enhanced opportunities for product differentiation where consumer demand exists, including new crops and cultivars, value added products, and new labeling.
- Explore how school and institutional buyer procurement policies, nutrition standards, and propensity to buy raw goods may support or deter local sourcing.
- Continue support for joint marketing and promotion programs within and across commodity groups, including CO Proud as a flagship brand.

3. Support enhanced consumer education around the Colorado brand

Increasing consumer awareness of Colorado's grown, raised and processed products has the potential to bolster financial and political support for the state's agricultural and food sectors. For example, a transparent and strongly linked agricultural and food sector can help consumers better understand areas that are intensively used for agriculture. As an example, Weld County is the fastest growing county in the state, but also the top agricultural county by sales. People may want to move to Weld County given its beautiful views and proximity to employment along the Front Range, but they may also be frustrated by the noise and smells that reflect normal agricultural activity. Consumer education can help to mitigate potential conflicts.

Further, enhanced consumer education around the Colorado brand may increase sales of locally-branded products to tourists and residents at restaurants, road side stands, and farmers markets. For example, tourists may be excited to try, and be willing to pay a premium for Colorado beef while visiting a ski resort if proper education ensues. Further, responses from the Colorado Public Attitudes Survey regarding consumer knowledge of typical season for availability of fresh produce indicates a lack of awareness among Coloradans (see Figure 8). Enhanced consumer education may help to create excitement, and willingness to pay, for Colorado grown products when in season, as well as incite increased interest in cooking among consumers.

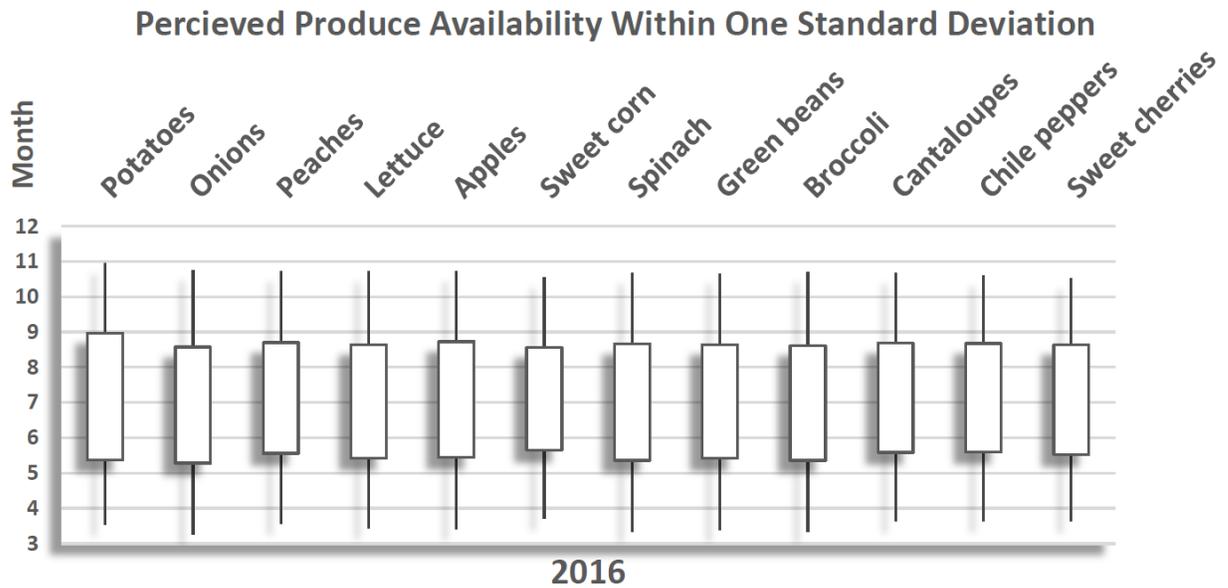


Figure 8. Perceived produce availability within one standard deviation, 2016 Colorado Public Attitude’s Survey.

Action Items:

- Continue promoting CO Proud as a means to educate consumers about Colorado grown and raised products.
- Find opportunities to educate and integrate chefs into local sourcing given that Chefs are trusted influencers for a segment of food buyers.
- Begin consumer education early through curriculum that leverages farm to school, as well as school and community garden programs targeted towards youth and families.
- Integrate cooking education programming with food access programming, including Double Up Food Bucks and Farm to School programs to meet both food security and economic development goals.

Support a business- and consumer-friendly regulatory environment

Regulations and the regulatory environment continue to be a hot topic among agricultural and food system businesses. Many businesses have long complained about government regulations and how they restrict production, innovation, profits, and growth. Yet, some of these regulations can serve to protect Colorado consumers and the businesses themselves. Regulation should serve to support a safe agricultural and food system, without being overly burdensome for the food and agricultural businesses in the state. Win/win solutions happen at the intersection of agriculture, community, and government.

Under the umbrella of supporting a business and consumer friendly regulatory environment, three key areas of opportunity were identified through the regional townhalls: 1) work to ensure the regulatory environment is fair and effective in meeting its goals; 2) support state level initiatives that leverage Federal programs and resources; and, 3) develop and refine policies that incentivize innovations along the food supply chain.

1. Work to ensure the regulatory environment is fair and effective in meeting its goals

The goals of regulation often focus on protecting consumers and communities. Accordingly, it is important to ensure that regulations are meeting their goals in a manner that is fair to producers and not overly burdensome. Regulation often does not adapt at the pace of market changes, and better mechanisms are needed to ensure that regulators understand new, pressing concerns that are impeding innovation.

Action Items:

- Assess how food safety requirements, environmental protection, zoning, and labor regulations affect the competitiveness and ability to innovate among farmers, food processors, restaurants, food banks, direct markets and retailers.
- Disallow or discourage non-compete clauses for retail food establishments, particularly in rural areas, to protect market access in less densely populated or underserved areas.
- Continue to provide training and technical assistance to alleviate the burden of regulatory compliance for young, beginning, and small entrepreneurial farmers, ranchers, and food businesses.

2. Support State level initiatives that leverage Federal programs and resources

Significant support programs exist at the Federal level to enhance the agricultural and food sector, support rural development, and improve access to healthy foods. Yet, there is more that can be done to ensure Colorado is taking advantage of these Federal programs to mitigate risk, support entrepreneurs, and provide safety nets for those who are hungry. As an example of the types of programs available, in 2016, the U.S. Department of Agriculture's Rural Development Agency awarded 1,515 grants and loans to the state for \$747,403,624 (between 2009 and 2016 there were 14,635 grants and loans awarded to the state for \$5,255,189,992). One of the programs that four producers took advantage of in 2016 is the Value Added Producer Grant. Through this program, The American Grassfed Association received funding to develop a marketing plan and branding recognition for the group's 400 members that provide grass fed beef to the market. However, with 325 projects awarded throughout the U.S. in 2016, Colorado is not capturing its fair share of this funding (see: https://www.rd.usda.gov/files/RD_VAPG2016Chart.pdf). As another example where Colorado is not taking full advantage of Federal funding opportunities, Colorado is 45th in the nation for access to food stamps, and falls well below the national average of 74% for state enrollment (Colorado is at 59% enrollment). According to Hunger Free Colorado, 2 in 5 (41%) of those

eligible for food stamps are not taking advantage of the program (see Figure 9). Colorado also ranks in the bottom ten states for eligible enrollment in the Women Infants and Children Program (WIC), and the number of eligible schools participating in the Community Eligible Provision that provides eligible schools free lunch to the entire student body.



Figure 9. Food Stamp Impact Reports and the Enrollment Gap. Hunger Free Colorado.

<https://www.hungerfreecolorado.org/impact-reports/>

Action Items:

- Improve enrollment of eligible Coloradans in federal nutrition assistance programs.
- Simplify the application for SNAP, WIC, and other food assistance programs for retailers and provide more counseling and education to help with the burden of the application. This could include expanding Hunger Free Colorado’s program in this area.
- Invest in a statewide center for beginning farmer and rancher development and a one-stop shop for Federal and State resources geared towards the next generation of producers.
- Improve awareness of federal grant, loan and technical assistance programs that could manage risk, share costs and bolster support for the state’s food and agricultural sector, including rural infrastructure.
- Advocate for standardized best practices throughout the state to ensure that business processes and access to support programs is uniform regardless of the county in which an eligible participant applies.
- Use the CO Food Policy Network (COFPN) and local government partners to develop and facilitate healthy markets and retailers in communities that can and do accept SNAP, WIC, and Double Up Food Bucks, tracking locally-grown and processed products in the state via new metrics, and pursuing strategies that jointly consider economic development and health outcomes.

- Engage government in addressing enrollment gap for food assistance including reviewing opportunities to adopt state options that expand eligibility to more Coloradans and reduce the risk-reward gap for applying and enrolling in support programs.
- Create public will for change among nonprofits, public officials, and academic partners in by leveraging work from the Colorado Health Foundation's existing statewide task force, and advocate for clear measurable objectives and outcomes.
- Encourage community partners to amplify messaging regarding eligibility criteria and enrollment process so that organizations across the state can help publicize and navigate nutrition programs for eligible Coloradans experiencing hunger.
- Support the clear goals and measurable outcomes of the emerging Blueprint to End Hunger in Colorado that will address the enrollment gap in programs such as SNAP and WIC.
- Raise awareness amongst farmers and ranchers, as well as all scales of retailers about the economic benefits to the state of having higher participation in Federal food programs such as SNAP.

3. Develop and refine policies that incentivize innovations along the food supply chain

Economic growth depends on technological progress. The public sector has long supported and subsidized research and development to support technological innovations. For these incentives to work, however, programs and policies need not just spur demonstration projects, but those innovations that can be used at scale. Further, some of these innovations will need to support rural communities in which many of the raw inputs for the food supply chain are produced. So, policies that encourage entrepreneurs and the next generation of agriculture to live and work in rural communities are important.

Action Items:

- Develop competitive funding programs and prizes that help to spur research and the creation of food and ag products for widespread use.
- Create a mini-grant program housed in DOLA, OEDIT, and/or CDA to incentivize municipalities to integrate agriculture and food into their local land use plans, building upon existing community assets.
- Assess the potential for an educational loan forgiveness program for targeted employment needed in targeted rural areas similar to recent support for rural veterinarians. Targeted areas could be based on persistent poverty, declining populations, or high cost of living in resort adjacent/amenity rich areas.
- Continue programs that offer tax incentives for land owners leasing to new/beginning farmers and ranchers, as well as loan repayment programs with favorable terms for producers.

Address how scale impacts market performance, access and opportunities

Profitability generally increases with scale. Along the supply chain, larger firms have more market power, particularly as supply chains become more vertically integrated and consolidated. However, small-scale firms play important roles in the food and agricultural sector. Perhaps most importantly, smaller scale operations can respond to changing consumer demand and innovate more quickly than can larger operations. Accordingly, it is not a surprise that big food companies spent billions of dollars acquiring smaller food companies in 2014 and 2015. Providing support for these smaller scale, and/or start-up businesses is an important component of ensuring vibrant food and agricultural sectors in the long run. And, it is not just support for the firm itself, but also the requisite appropriately-scaled supply chain infrastructure.

Under the umbrella of addressing how scale impacts market performance, access and opportunities, two key areas of opportunity were identified through the regional townhalls: 1) provide technical assistance and business support services for all scales of agricultural and food firms; and, 2) ensure appropriately-scaled, economically-viable assets are in place to support all scales of agricultural and food firms.

1. Provide technical assistance and business support services for all scales of agricultural and food firms

Technical assistance and business support services can equip aspiring and established entrepreneurs with the skills and tools necessary to run and grow small businesses. Small business owners wear many hats. Management generally includes marketing, financial, supply chain and human resources – and it is rare to find a single person who is adept and knowledgeable about each of these functions. Accordingly, until a business scales to a point at which they can hire additional people, technical assistance and business support services can help to provide temporary support and guidance in the decision-making process that can help position the business for long-term success.

Action Items:

- Develop pitch competitions, mentorship opportunities, and co-working spaces for new food businesses such that they can take advantage of economies of agglomeration.
- Provide market research, outreach, and mentoring programs to improve the viability of farms and food businesses by scale, commodity, and market channel. This should include careful documentation of successes to promote best practices, successful business models and key benchmark metrics.
- Support succession planning both for farm families and veterans interested in taking over an existing farm or food business operation. This should include finding opportunities to build equity prior to taking over the operation.

- Deliver education and technical assistance programming for food safety training, risk management, taxes, human resources, and other paperwork to support smaller scale farms and ranches (example: replicate Kentucky’s MarketReady Training).
 - Continue to provide cottage food training for nascent food businesses, including continual evaluation of curriculum based on technological advances and changes in regulation, and integration of business planning principles.
2. Ensure appropriately-scaled, economically-viable assets are in place to support all scales of agricultural and food firms

Opportunities exist to support small and mid-scale farms, ranches, and food businesses through product differentiation. Farmers and ranchers, however, note that limited processing infrastructure restricts supply and sales. For small and mid-scale ranchers interested in selling their products via freezer trade, Community Supported Agriculture, farmers market, or other direct marketing arrangements the challenge is particularly acute (see Figure 10). Appropriately scaled processing facilities with the skills, inspection status, and reliability to prepare these products safely, legally, and to customer satisfaction is integral to the success of these operations.

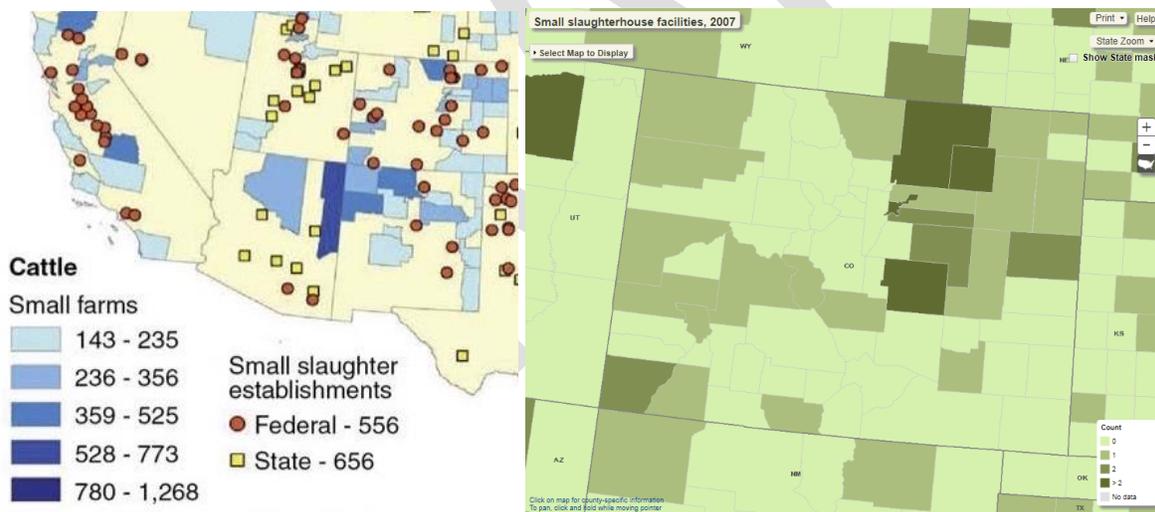


Figure 10. Counties with no small cattle slaughter facilities and 143 or more small cattle farms. Source: USDA, Food Safety and Inspection Service (FSIS). Farm size is based on the 2007 Census of Agriculture conducted by USDA, National Agricultural Statistics Service. Slaughter establishment data are for 2010 from USDA/FSIS.

Action items:

- COFSAC should provide leadership on a white paper on the economics of small scale meat processing to distribute to communities. Almost every regional townhall discussed

the need for additional small scale meat processing, but there may be opportunities to leverage existing processing infrastructure without additional capital investments.

- Support regional food testing and certification labs that provide food safety, quality assurance, and other key business services for all scales of food and ag businesses, including the beverage sector.
- Continue to support collaboration between CSU Quality Meats Lab, Extension, CSU Vet Med, CDA and others to encourage safe and economically-viable small-scale poultry processing regulation in the state.

Innovate and support new technology for agricultural and food businesses

Colorado, with a booming tech industry – including being 3rd in the nation for high tech workers, has a key opportunity to marry technological with food and agricultural innovation. Big data apps can allow consumers to make more informed choices at the grocery store about how their food is produced, technological innovations in distribution can support food delivery by drone, sensors can help farms to target water usage, and crowdfunding platforms can help new businesses access capital. And, there are already several areas where this is happening. Naturally Boulder, for example, brings together entrepreneurs with investors through mentorship programs, pitch slams, networking nights, and educational seminars.

Under the umbrella of innovating and supporting new technology for food and agricultural businesses, three key areas of opportunity were identified through the regional townhalls: 1) nurture an environment where Colorado is a leader in several subsectors of agricultural technology; 2) enhance education, outreach, and networking to the investor community so that they better understand opportunities to provide capital in the agricultural innovation space; and 3) support curriculum, youth and workforce development programs that provide the skills and experiential learning for the jobs that will be available in both the entrepreneurial and high tech sectors of food and agriculture.

1. Nurture an environment where Colorado is a leader in several subsectors of agricultural technology

Napa Valley, CA, is known for its wine, Hartford, CT, for its insurance, Las Vegas, NV, for its casinos – all of which are examples of industry clusters. Industry clusters are regional concentrations of related industries. By locating in proximity to each other they can take advantage of a trained workforce, access to shareable inputs, and educational opportunities, which improves regional competitiveness and opportunities for economic development. In Colorado, there are several agricultural subsectors where continued support and investment could boost its cluster and regional dominance, these include: water technology, animal health, alternative energy, beverage industry, wheat breeding, beef seed stock, humane animal handling processes, healthy and natural food products, and fast casual restaurant concepts. Through nurturing an environment in which Colorado continues to invest in its strengths, the state can become an unparalleled leader in many of these critical areas.

Action Items:

- Create financing and incentive programs at the local and state levels to nurture regional industry clusters in a variety of sectors.
 - Document available infrastructure (for example, co-packers or sensory labs) that might provide shared access to entrepreneurs during their start up phases.
2. Enhance education, outreach and networking to investor community so that they understand opportunities to provide capital in the agricultural innovation space

Money flowing to food start-ups in Boulder County is third only to two other regions of the US: New York and Silicon Valley. Interestingly, whereas the financial investments in New York and Silicon Valley have gone to just a handful of companies, in Boulder, the money is more widely spread across dozens of companies. This precedent, and the networks already established, provide an opportunity to attract more investment/investors. And, the investor community is not just limited to private individual and firms. The Federal government, for example, is investing in hoop houses through the Natural Resource Conservation District to meet shared goals. Similarly, the Kitchen Community (its CEO and co-founder is Kimbal Musk) is investing in school gardens in the hopes of catalyzing long-term change including interest in food and agriculture.

Action Items:

- Replicate investor network, including educational and outreach opportunities in two other locations throughout the State.
 - Provide statewide matching grant program (through OEDIT) to leverage investment in key food and agricultural sectors, particularly for startups.
3. Support curriculum, youth and workforce development programs that provide the skills and experiential learning for the jobs that will be available in both the entrepreneurial and high tech sectors of food and agriculture.

To excite youth about careers in agriculture and the food system, opportunities exist to more fully integrate STEM and tech training into all aspects of 4-H and FFA curriculum. Through experiential learning – hands-on activities and projects in the field – youth may gain appreciate for the ways in which technology is integrated into all aspects of agriculture and the food system. Ongoing activities in 4-H include environmental science and alternative energy, engineering and technology, and plant and animal science. Further, Colorado can leverage its well establish tech industry to support skill development for youth working with 4-H and FFA. Google, for example, is already partnering with the National 4-H Council to support computer science, computational thinking, communication, and collaboration to kids across the country.

Action items:

- Support collaborations between 4H, FFA, and the tech industry to foster innovative curriculum development in ag tech that reflect where careers in this sector will be in high demand.
- Emphasize that the use of technology in agricultural 4H and FFA curriculum, as technological innovation may be more likely to retain youth. Opportunities exist to jointly honor Colorado’s traditional primary agriculture industries, while understanding new sectoral career opportunities and entrepreneurial business models.

Improve access to resources and capital for agricultural and food firms

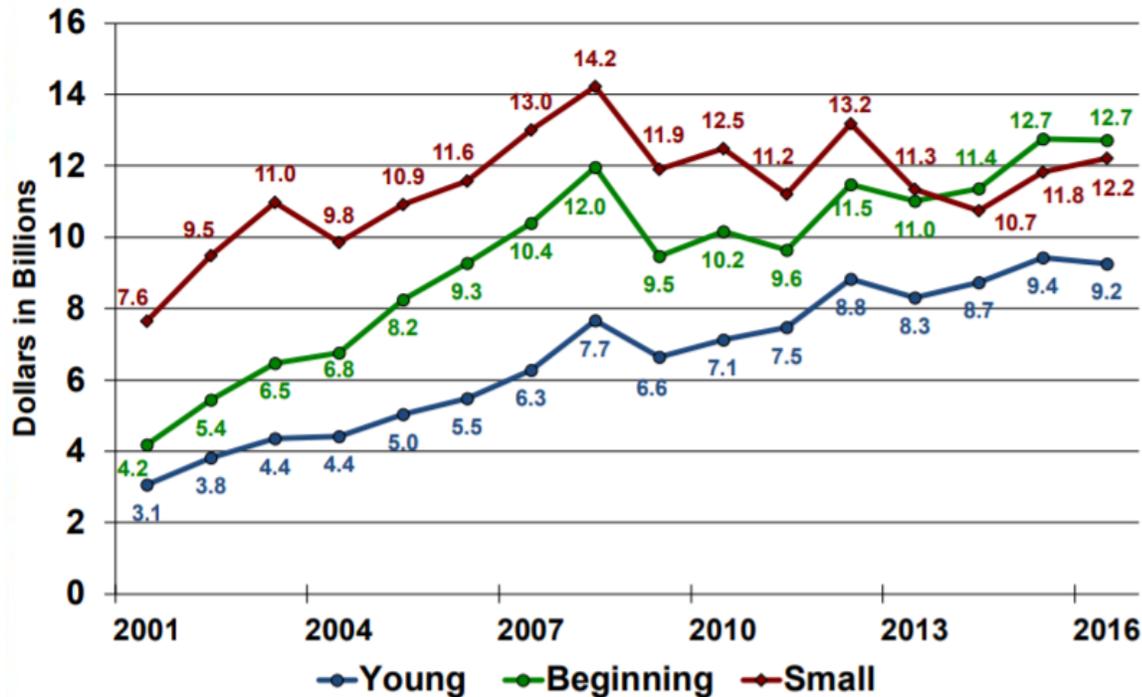
Access to capital – including financial capital and natural capital (land and water) – can be difficult for young, beginning, and small farmers and ranchers, as well as new, entrepreneurial start up food businesses. Yet, access to capital in order to finance a new start-up, expand, purchase land or equipment, or build inventories to support a market expansion are all critical to enabling long-term business success.

Under the umbrella of improving access to capital for agriculture and food firms, two key areas of opportunity were identified through the regional townhalls: 1) facilitate relationships between young, beginning, small and veteran farmers and ranchers and lending institutions with Young, Beginning, Small (YBS) farmer and rancher programs and/or nontraditional fundraising; and, 2) support innovative ways to provide access to natural capital (land and water) for YBS farmers and ranchers.

1. Facilitate relationships between young, beginning, small, and veteran farmers and ranchers and lending institutions with YBS programs and/or nontraditional fundraising

Generally speaking, access to credit for farmers and ranchers is a scale issue. Smaller scale, beginning farmers and ranchers often have more difficulty accessing traditional credit compared to larger operations with more capital assets to use as collateral. Congress has mandated that the Farm Credit system serve the credit needs of all farmers and ranchers, including those classified as young, beginning, and small (YBS), believing that the diversity of agricultural products produced in the U.S. depends in part on the financial success of this segment of agriculture. Accordingly, Farm Credit system members are now required to report on YBS data lending annually (see Figure 11). The Farm Credit system also has specific tools to facilitate this lending including guarantees, reduced rates, and customized standards that can be used to extend credit to YBS producers. However, many future farmers and ranchers, particularly those that did not grow up in and around agriculture, may not be aware of these opportunities. For example, Colorado has a Veterans to Farmers program that was started in 2011 and trains military veterans in organic and hydroponic production. Most of these veterans have no previous agricultural experience, and little exposure to their unique opportunities for securing debt

financing. In addition to increasing educational opportunities about traditional lending, exposing YBS and veteran farmers to nontraditional fundraising may be important. These might include gifts from individuals, crowdfunding, community-supported models, federal grant and loan programs, individual and angel investors, and foundations or philanthropic organizations.



Source: Annual Young, Beginning, and Small Farmer Reports submitted by each System lender through the District Banks

Figure 11. New YBS Loan Volume, reported by the Farm Credit Administration. 2001-2016.

Action items:

- Educate farmers and ranchers about loan programs geared to small-scale farmers and ranchers.
- Provide resources to agricultural lenders so that they better understand realistic price premiums associated with non-commodity markets, as well as enterprise budgets, which can support sound lending decisions for YBS farmers and ranchers. This likely includes continuing CSU Extension and CDA’s price reporting program for local food markets.
- Track farms and ranches using new insurance products to understand the financial implications of these products and producer investments and provide information to loan officers.
- Showcase successful YBS-lender relationships at annual meetings of agricultural commodity groups.
- Encourage statewide loan officers to attend Farm Credit’s YBS loan officer convenings.
- Embed educational opportunities about nontraditional fundraising into beginning farmer and rancher programming.

2. Create more transparent and flexible funding/financing models to support new and emerging business ventures along the food supply chain

In addition to needing funding models to support small and midscale, young and beginning, and veteran farmers and ranchers, innovative funding and financing models are needed to support food supply chain businesses along the supply chain. Luckily, Colorado has several successful models that could be enhanced and scaled up. For example, the Colorado Fresh Food Financing Fund, with seed funding from the Colorado Health Foundation, partners with the Colorado enterprise Fund to finance small and innovative fresh food concepts. These partners work to finance grocery stores and other forms of healthy food retail in underserved communities. Other flexible funding or financing models include Slow Money and angel investor networks.

Action items:

- Develop list of food business funding resources that could support emerging Colorado-based food businesses (expanding upon: http://www.canr.msu.edu/foodsystems/uploads/files/food_business_funding.pdf)
 - Host networking opportunities and pitch competitions to facilitate relationships between small and emerging food businesses and potential funders and financiers.
 - Promote ‘preparing for financing’ events for small and mid-scale entrepreneurs, similar to what is already offered by Naturally Boulder (see: <https://www.naturallyboulder.org/resource/preparing-for-financing/>)
 - Expand investment efforts and increase availability of flexible funding and financing of agriculture and fresh retail options, particularly in rural and underserved communities.
3. Conserve, invest in and provide access to natural capital (land and water) for YBS farmers and ranchers

According to the U.S. Department of Agriculture’s National Agricultural Statistics Service, the average value per acre of farm real estate increased by 6.7% in Colorado from 2014-2015, compared to an average in the Mountain region of 2.8%. And, according to the American Farmland Trust, Colorado is losing more than 75 acres of farmland per day. At the same time, approximately 35.9% of Colorado’s land is Federally-owned, and substantially more is owned by state and local government, or private conservation entities such as the Nature Conservancy. Working to support enhanced access of these public and conserved resources to the next generation of farmers and ranchers can lower barriers to entry, and increase the likelihood of long-term viability.

Action items:

- Work with local municipalities, nonprofits, and land conservation districts in places where there are large numbers of second homeowners or retirees to explore opportunities to

better link YBS farms and ranches with access to potentially underutilized land and water resources.

- Improve communication among land trusts, and between land trusts and future farmers and ranchers.
- Investigate the potential for enhanced utilization of publicly owned land for active farming and ranching working lands, and just not just for open space, addressing multiple public issues and goals
- Explore and evaluate the viability of cooperative and innovative land ownership models (such as Poudre Valley Community Farms).
- Invest in soil, water saving, technology to preserve the integrity of Colorado's natural resource base.

Integrate agriculture and food with healthy, vibrant communities

The recent Public Attitudes Survey shows that almost all Coloradans believe that agriculture is moderately or very important to their quality of life (see Figure 12). Agriculture can contribute to environmental preservation, protection of public and animal health, economic development, and community building. Providing opportunities to support dialogue, transparency, and engagement throughout the food system can ensure that the various aspects of our complex, global food system are working to support local people, communities, and economies.

Under the umbrella of improving access to integrating agriculture and vibrant communities, three key areas of opportunity were identified through the regional townhalls: 1) research and refine how land conservation policies influence farm viability, water transfers, community development, and quality of life of Coloradans; 2) strengthen healthy food access for Colorado communities and households; and, 3) more strongly connect Colorado citizens with Colorado foods while also raising their awareness of its potential benefits to their health, economy, and community.

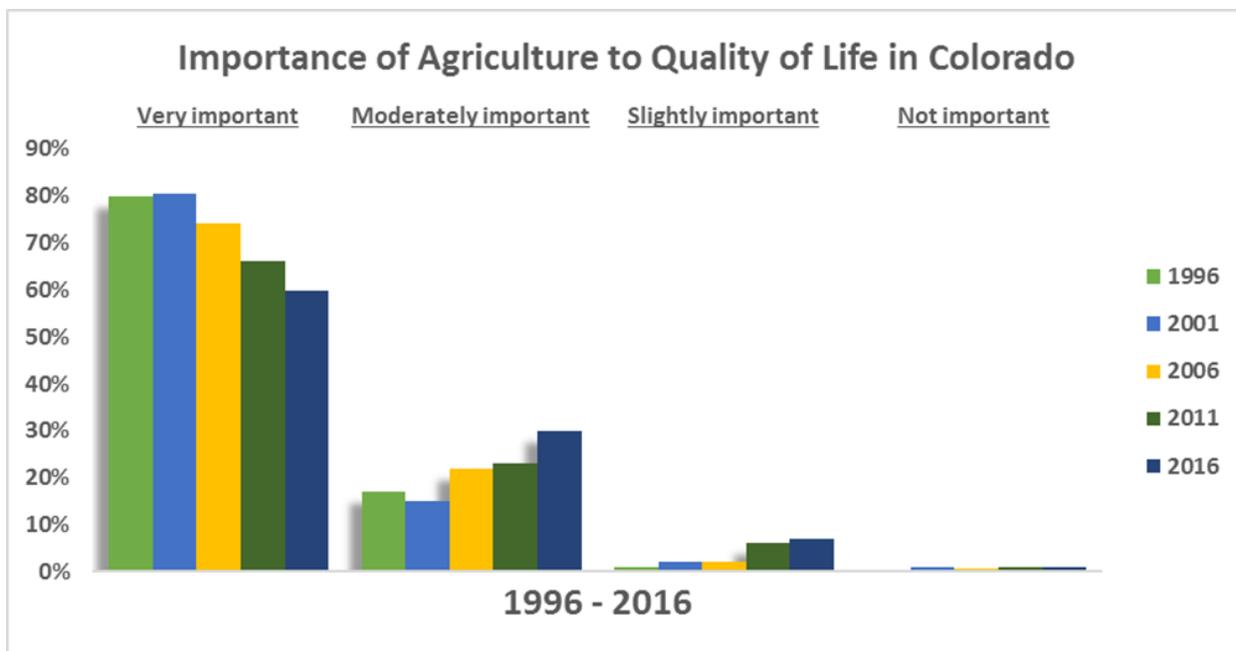


Figure 12. Importance of Agriculture to quality of life in Colorado, 1996-2016. From the Public Attitude's Survey.

1. Research and refine how land conservation policies influence farm viability, water transfers, community development, and quality of life of Coloradans

Many communities and organizations are pursuing land conservation policies. Yet it is unclear how these programs impact farm and ranch profitability (or viability), water transfers, community development, or quality of life. More research and evaluation is needed in order to provide recommendations of how and where land and water should be conserved for agriculture; this is particularly important given the state's current growth rate (1.9% from 2015 to 2016), the fact that the state lost farms between 2007 and 2012 (37,054 to 36,180), and rates of agricultural land converted to development land (601,700 acres from 1982-2012).

Action items:

- Explore how public attitudes about agriculture as a quality of life driver may also influence the appearance and passage of open space referendum, support for CO agricultural programs, and propensity to buy CO products.
- Identify where open space and other conservation efforts are innovating ways to retain and manage shared access to sufficient water for some working lands production.
- Inventory current conservation practices by land type and geographic location.
- Access and document where land is currently protected, or not.

2. Strengthen healthy, affordable food access for Colorado families who are low-income.

Many Coloradoans do not have access to healthy, affordable food. In 2015, the USDA reported that 12.1% of households in Colorado were food insecure, a condition where households lack access to sufficient food because of limited resources. The percentage of food insecurity is much higher for households with children: almost 20% of kids may not always know when or where they will get their next meal. Food insecurity is associated with poorer physical and mental health, higher healthcare costs and poorer educational outcomes. Strategies that increase affordability of nutritious food, increase access to food by increasing enrollment in federal nutrition assistance programs and increase nutritious value of food in the emergency food system can economically benefit food producers and food retailers, and can improve the health and well-being of food insecure households in Colorado.

Action Items:

- Conduct research and evaluation of current strategies to improve healthy food access (transport, financial incentives, food offerings, corner stores, mobile markets, rural grocers, community food cellar, prescription programs, mobile farmers markets) and refine programming based on results.
- Lower the barriers and provide incentives and technical assistance for a variety of markets to procure local products, accept food assistance programming, and participate in food recovery partnerships. Double Up SNAP has been effective, but the majority of markets still cannot accept food assistance.
- Reframe food recovery and food waste programs so that both economic development and food security goals are addressed.
- Assess and pilot food additional RX programs (a prescription program piloted on the West Slope), as well as double up buck program availability at rural markets to assess both whether participants are healthier and whether purchases made influence local direct markets.
- Coordinate food bank purchases from local sources, tax incentives to those who donate, and effective/efficient gleaning programs so as to increase healthy food access at food banks and pantries.
- Improve coordination and communication across key food system stakeholders in the state, particularly focused on economic development, food access, and healthy communities (environmental and public health). This can be done through working with philanthropic organizations to create a database of programming and financing provide to farm and food based orgs (could be through Community Commons).
- Connect more retailers with food rescue and redistribution organizations through partnerships and policies that incentivize donations.

3. More strongly connect Colorado citizens with Colorado foods while also raising their awareness of its potential benefits to their health, economy, and community

Opportunities exist to better link programming that supports healthy eating with Colorado grown and raised products. Fostering a deeper connection to the foods that households are purchasing and consuming can increase awareness and appreciation of how food are produced, and can make linkages to natural resources and broader community benefits. Coloradans shared interest in and support for agriculture as important to quality of life helps to bind the state around shared values, which may help to build long-term resiliency and trust.

Action items:

- Continue to update value chain, Community Commons, and Blueprint studies, integrating staff and planning processes of state agencies, industry organization, nonprofits, and CSU so as to track progress on key metrics that Coloradans note are important to their quality of life.
- Support and expand programs that highlight the faces of Colorado agriculture to the general public, including Colorado Proud, CSU Ag day, programming at the National Western Centers, and programs that integrate healthy food with Colorado grown products such as Farm to School, Double Up Food Bucks, and Cooking Matters.
- Highlight unique food cultures, heritages, and regions that make up the Colorado agricultural and food landscape through strengthening rural-urban linkages.