

Seafood For All

BOAT TO FOOD BANK PILOT PROGRAM EVALUATION



EATING WITH THE ECOSYSTEM

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BACKGROUND

Eating with the Ecosystem is a Rhode Island-based nonprofit that meshes conservation education, culinary arts, storytelling, and marketing to design and promote a "place-based approach to sustaining New England's wild seafood." The Eating with the Ecosystem vision is one in which seafood consumers take their cues on seafood consumption directly from the ocean, varying their eating habits with fluxes in the abundance of local species and distributing their consumer pressure over a wide array of components of the wild domestic marine ecosystem.

In 2015, Eating with the Ecosystem received funding from the Rhode Island Local Agriculture and Seafood Act (LASA) small grants program to test whether there is a good fit between lower-value, abundant species in the region and Rhode Island's emergency food distribution system, by launching a pilot project to connect the dots between local fishermen, the Rhode Island Community Food Bank (the Food Bank), and the Food Bank's network of agencies (food pantries and congregate¹ meal sites) around the state to determine what works and what doesn't.

This project was not the first time that an attempt has been made to connect Rhode Island commercial fishing boats and food pantries. In the early 2000s, the Commercial Fisheries Center of Rhode Island spearheaded a program that sought a regulatory change that would have allowed fishermen who

exceed their catch limits to donate that excess seafood caught to the Food Bank (rather than paying for those overages in fines or in deductions against future catch limits). To trial the idea, Rhode Island fishermen donated an estimated 10,000 pounds of whole scup and fluke to the Food Bank, with fishermen making those donations from within the limits of their catch quotas. The Food Bank picked up the fish directly from the boats with their own fleet of refrigerated trucks, and their culinary jobs training instructors processed and packaged the fish in-house.



1. Congregate meals are served in community settings such as senior centers, churches or senior housing communities.

Although the donated fish was successfully distributed to and enjoyed by food pantry clients, the program did not continue because of inefficiencies in the approach to processing, lack of cold storage among agencies in the Food Bank's network, failure to secure the regulatory changes relating to catch limits and donations, and tighter food safety guidelines and health regulations that make seafood repacking untenable. As a part of this effort, the Food Bank also tried freezing the fish, and found that frozen seafood was far easier to distribute across their network than fresh. As the Food Bank has built up freezer capacity across their network of agencies in recent years, it has increased their purchases of seafood (fish sticks, cod fillets, e.g.), and has found that seafood is popular with their network. Over the years the Food Bank has also had conversations with the seafood industry exploring opportunities to capture donations or appropriately priced products- while there have been isolated successes, those successes have not been sustained.

Eating with the Ecosystem's pilot was built on this history as well as the findings of feasibility research² that the organization conducted in collaboration with the University of Rhode Island's Department of Environmental and Natural Resource Economics in 2015. That study concluded that while difficult, seafood-to-food pantry supply chains in RI would be possible to build: interest on both ends of the supply chain was found to be strong, but logistics, storage, and pricing were foreseen as obstacles. The knowledge gap highlighted by the feasibility study prompted Eating with the Ecosystem to apply for a LASA grant to pilot this supply chain in a real world setting (2016-2017).

Karen Karp & Partners (KK&P), a food systems consultancy, was retained at the end of 2017 to evaluate this pilot project. As part of this evaluation, interviews were conducted with leaders of Eating with the Ecosystem, the Food Bank, and three seafood processors. And in collaboration with the Food Bank, twelve food pantries were surveyed about their experience with the seafood received through the pilot.

The following questions guided Eating with the Ecosystem's pilot project and, in turn, guide this evaluation:

(1) Are there certain demographic groups or geographic locations with stronger interest in certain types of seafood?

(2) Does the Food Bank's ability and willingness to pay for a pound of seafood match the costs to seafood processors of purchasing, processing, and packing a pound of seafood?

(3) Are there third-parties who are able to help finance this sort of transaction on an ongoing basis?

(4) What species are the best candidates for this supply chain, either because they are caught and discarded due to lack of market value or because they are currently brought to market at a low price and sold out of state?

(5) For species that are abundant but not currently landed, what price (if any) would fishermen need to receive from dealers to make it worth their while to land those species, and what price (if any) would processors need to receive in order to process those species in a format usable by food pantries?



BUILDING THE SUPPLY CHAIN: HOW IT WORKED

The 2015 feasibility study² tentatively concluded that the key challenge to a boat to food pantry program would be on the demand side: building food pantry client comfort with whole fish and willingness to experiment with lesser known species. In the end, the issues faced were primarily on the supply side: troubleshooting packaging and pricing, getting processors' attention and keeping them engaged, and identifying species that would be a good match for these efforts from a supplier standpoint.

Two Processing Partners

This pilot project built supply chains tailored to two very different processing businesses: different services, scales of operations, and business structures.

Town Dock is a vertically integrated seafood wholesaler, operating since 1980. The company owns seven independent vessels and purchases from over 100 vendors, including independent fishermen who land at their facility. By volume, their top species are squid (of multiple types), summer flounder/fluke, and scup. The company typically prepares whole fish in 25-60lb packs for sale to seafood wholesalers. The company's highly mechanized facility is set up to process 10-15,000 lbs of fish per run.

Tony's Seafood launched in the early 1900s and is a smaller operation, with all processing done by hand in a six person cutting line (with the exceptions of shellfish grading and skinning machines for select species). While Town Dock specializes in whole fish, Tony's fillets. With no proprietary boats, the company purchases and processes a wide variety of species from local fishermen (including full boatloads from a few local dragners) and various New England seafood auctions.

Communication, Outreach, & Seafood Processor Engagement

Eating with the Ecosystem initially reached out to six Rhode Island based seafood processors to engage them in this pilot project. One never replied. One was determined not to be a good fit because of lack of freezer capacity. One went in and out of contact- after 26 points of outreach, it was determined that that company was too busy to participate. A fourth company was highly interested: specific products were discussed, prices were agreed to, and packaging was explored. Ultimately, however, no transactions were executed, because the project came at a busy time when there was high competition for use of the processing plant.

Two companies ended up supplying seafood for this pilot project. Eating with the Ecosystem documented about 85 points of contact with these two companies, from broad conversations to detailed follow ups on orders and invoices, over the course of the project. Processors reported that their reasons for wanting to participate in the first place are the same as the reasons they want to see the program continue. They wanted to help food insecure people access a good, available, and delicious protein. And they wanted to "optimize the catch in this state", and build up markets for local, place-identified seafood.

Species

The original premise of the project was that the Food Bank would receive donations of unusual or lesser known species, those not normally found in restaurants, supermarkets or in the Food Bank's donation chain. The pilot focused on underutilized or "under-appreciated" species to test whether there was in fact a correlation between low primary market demand and high opportunity for emergency food supply chains, and because increasing the diversity of seafood species consumed is core to Eating with the Ecosystem's mission.

In the end, three species were distributed as a part of this pilot: cod, scup, and sea robin. Of the three, sea robin was the only species that the Food Bank partner food pantries had never received before from other sources.

Cod is of course neither lesser known nor underutilized. However, in discussion with Tony's Seafood it emerged that cod napes, a byproduct of the cod filleting process (a roughly 2x2 inch piece of meat), were a high quality product with a relatively low market value and thus a strong opportunity match for the Food Bank.

Scup, commonly known as porgy in other parts of the country, was provided to the Food Bank whole and gutted. And sea robin was distributed as "tails" (headed and gutted). Though they are often used for bait, one of the fishermen who supplied the sea robin described the species as "one of the best eating fish there is."

Packaging

Identifying the right packaging was a central issue of the pilot project, in order to maintain product quality, ensure food safety, meet the Food Bank's safety and quality requirements, align with the processors' labor capacities, suit the species of fish and form of fish (e.g. pieces vs. tails vs. whole) being handled, and - perhaps the greatest challenge- remain affordable for the Food Bank. Both of the processing partners typically process the majority of the seafood they handle into 5 pound blocks or larger, more appropriate for wholesale, food service, or a very large family than for a typical food pantry client household. Because the Food Bank's network is majority food pantry with a very small constituency of meal-based programs, this processing pack was not seen as tenable. Based on feedback from the food pantries, Eating with the Ecosystem and the Food Bank determined that two pound packs would be ideal for Rhode Island food pantry client households.





Packaging for each of the three species handled in this pilot evolved as follows:

- Cod: A two pound bag pack (2 bags together in a cardboard box) was trialed and rejected because the bags were sticking together and the product itself did not look as appealing as it should. After much brainstorming and market research on packaging options, two pound tubs with safety seals were identified as the optimal pack for this product. These were delivered to the Food Bank in 16 pound cardboard boxes, 8 tubs to a box.
- Scup: Scup is a notoriously difficult fish to process, and no Rhode Island based processor currently has a mechanized scup filleting line. Thus for this project, scup was minimally processed by hand: gutted and packed. Initially, scup was packed in 5 pound cardboard boxes. Quality and food safety concerns from the Food Bank resulted in the addition of a plastic liner.
- Sea robin: Sea robin were processed into "tails" (gutted and headed) and were provided to the Food Bank individually, in bags that averaged about one pound.

Processors faced another packing challenge: assembling the right combination of fish of different weights to get to a two pound pack. While this would be easier with small fish like herring, larger fish like scup present a challenge.

"Finding the time to work together to get the packaging right was key. Eating with the Ecosystem worked well with the processors to crack that nut."

Labeling was another issue, including both content and finding the right match between label and packing material to ensure the label would stick through freezing, transport, storage, and defrosting. Labels were created that included the dealer name, processing date/freeze date, species (including Latin name), an allergen warning ("contains fish"), storage instructions (store in the freezer and thaw in the refrigerator), and food safety-focused cooking instructions (cook to an internal temperature of 145 degrees before consuming).



Pricing: Covering Costs and Planning for Volatility

In the beginning of the pilot, for each of the three pilot products, Eating with the Ecosystem purchased seafood using grant money and funds from individual donors and then donated product to the Food Bank. In March of 2017, the Food Bank began paying the processors directly for all the cod napes that they purchased, an indication of continued program buy in and longevity. The other two tested products - whole gutted scup and frozen sea robin tails - had not yet graduated to a self-sustaining supply chain by the pilot project's conclusion.

The partner processors both noted that the pricing they received over the course of the pilot was fair enough to enable long term engagement with the Food Bank, but as one of the noted, "I like the program better than I like the pricing."

Prior to this pilot project, Tony' would ship cod napes out of state for salting, a market that would bring in almost double what the Food Bank pays. The company prefers, even in the long term, to accept a lower price and have sustained business with the Food Bank, noting that they see "better value" in sending it to the Food Bank because of the Food Bank's mission, because they're a local partnership, and because they're a reliable market.

Packaging was, as noted above, a key factor in pricing. The search for the right packaging resulted in the cod nape price increasing from \$1.00 to \$1.50 per pound over the course of the project. The Food Bank liked the improved packaging and were willing to pay extra for it.

Sea robin also started at \$1.00 per pound but eventually rose to \$1.50, primarily because of the cost of labor. The processor sees this price as sustainable in the long term unless market conditions for sea robin change dramatically (e.g. demand increases).

Tony's noted that between June and November, when sea robin is typically abundant, they could process up to 1,000 pounds per month of sea robin for the Food Bank at that price.

For this pilot project, the price of scup to the Food Bank remained stable at \$1.00 pound. However, both key partner processors we spoke with noted that scup pricing is volatile, and that better timing of processing to coincide with "the flow of fish" would allow processors to keep prices low. Still, one processor noted that, in the long term, raising the price to \$1.50 per pound for scup, processed and packaged, would ensure that his costs are covered. Town Dock reported that there are somewhat predictable windows of opportunity to purchase scup when market conditions would be favorable for the Food Bank: February, April, May, October and November are all months in which at some point processors are flooded with scup and prices are low.

Whiting, another fish discussed as an option, is also price volatile (ranging from \$0.10 to \$1.85 per pound, price paid to the fishermen), but was identified by one processor as an opportunity fish for the Food Bank. It is easy to clean, processors are already moving millions of pounds of it to other markets, and it has the added benefit of averaging 4 fish per pound, making the target of a two pound case relatively easy to achieve.

According to one processor, butterfish is another opportunity fish for the Food Bank and one with pricing that is reasonably stable. The fish are small (~5 fish comprise a pound), and it's seen as easier to handle than scup ("You look at the scales and they fall right off"). Demand for butterfish used to come primarily from China and Japan but has fallen- absent that demand, fishermen currently avoid butterfish, so they would need to be incentivized to land it. The processor estimated that the \$1.00 per pound price point including packaging would be achievable with butterfish, with a minimum of \$.25 per pound paid to the fishermen.

One fisherman interviewed for this evaluation noted that for scup or sea robin, a minimum of \$.25 per pound is the price he would need in order to justify the catch.



For smaller volumes, that price would increase to \$.40-.50 per pound. Importantly, these prices fluctuate depending on the composition of the catch for the trip as a whole (in other words, the prices paid to the vessel for scup or sea robin could be lower if higher value fish are also being caught on that trip). Because seasons are getting shorter and quotas have been getting smaller for higher value fish like sea bass and fluke, the pricing of these lower value fish is- to the fishermen- elevated in significance.

The aforementioned feasibility study identified several other species that did not arise in interviews for this evaluation, but which warrant further exploration: herring and skate in whole form; filleted dogfish and spawned-out yellowtail flounder; and skate wings (including off-spec skate wing).

Distribution

Transporting the seafood from the processors to the Food Bank was not reported to be a challenge by any party involved. At times the Food Bank picked up product at the processors' facility, and other times seafood was delivered to the Food Bank central warehouse.

Once the seafood was in the Food Bank's warehouse, when volumes were high enough, the products were included in the Food Bank's online ordering system. When volumes were insufficient to warrant placement in that system, the Food Bank selected the participating pantries based on their cold storage capacity and pantry distribution schedules, with a goal of moving the seafood out of the Food Bank freezers and into food pantries as quickly as possible. This rapid redistribution approach is one the Food Bank usually takes for perishables, but it was used in this case for frozen product because the volumes per order were typically quite small. (For example, one agency typically might order 30 to 40 cases of seafood from the Food Bank at any given time to meet customer demand, while the average delivery to the Food Bank for this pilot was closer to 20 cases).

Economies of Scale

For Town Dock, with a processing facility optimized for large scale runs, finding ways to use the processing plant and labor to prepare a 300 pound order in an efficient way required creative thinking. Though smaller and more nimble, Tony's also moves thousands of pounds per week through its facility, and while a 300 pound order fit more smoothly into their day to day operations than into Town Dock's, both processors noted that the ability to plan for larger volumes for the Food Bank would increase efficiencies and enable them to maximize seafood price fluctuations.

WHERE DID THE SEAFOOD GO? HOW WAS IT RECEIVED?

The Food Bank acts as the central warehouse, procurement team, and logistics hub for a network of approximately 150 food pantries and meal sites around Rhode Island. Almost three quarters of these network agencies are centralized in the urban cluster in the northern part of the state. Nationally, food pantries struggle to accept, handle and store perishable product, with capacity challenges including lack of cold storage infrastructure and limited human capital (many pantries depend heavily on volunteers and thus do not consistently have on hand able-bodied people to receive product and move it into coolers in a timely way). However, shortly before this pilot project began, the Food Bank invested in increased cooler and freezer space at forty pantries around the state, positioning them well to participate in a pilot like this.

The Food Bank received seafood as a part of this pilot 28 times between March 2016 and December 2017, with each delivery averaging about 320 pounds. A total of 8,670 pounds of seafood were distributed as a part of this pilot, distributed unevenly across three species (as depicted below).

"We don't necessarily know what to do with scup-but our network does."

- RI COMMUNITY FOOD BANK

In addition to those 8,670 pounds which were purchased by Eating with the Ecosystem, in March 2017 the Food Bank began ordering the cod napes directly from Tony's with their own procurement budget. Between March and December 2017, the Food Bank purchased an additional 8,969 pounds of cod pieces based on a relationship developed as a part of this pilot project. These purchases absorbed the total volume of cod napes that Tony's had available as a byproduct of their cod processing business. There are however other times during the year, such as Lent, when seafood demand, processing activity, and availability of cod napes spike. The processor noted that at this point the program runs itself.

Species	Pounds	%
Cod	6,294	76%
Scup	1,272	15%
Sea Robin	1,104	9%
Total for the Period	8,670	100%

Beyond this pilot, most of the seafood that Food Bank community partner agencies receive is cod and is not source-identified- it may be from the region, or it may not be. Because the majority of seafood moved through this pilot was also cod, getting true feedback on this cod product and the experience of this pilot was challenging. For that reason, this evaluation surveyed only pantries that received scup and/or sea robin, products they would not receive in any other way.

Thirty agencies received seafood as a part of this pilot, including 5 agencies that received scup, 24 that received cod, and 8 that received sea robin. Of the twelve agencies that received the scup and sea robin (only one agency received both), the two less recognizable species, eleven were included in the survey. Pantry customers were not surveyed as a part of this evaluation, but pantry leaders were asked to rate customer approval of the two products.

Consistent themes emerged in the survey results and results are illustrated below, by species.

	Sea Robin	Scup
% of customers who like/love the fish*	80%	60%
Utilized (vs. disposed)	100%	100%
Customer demographics	Hispanic, African, African American	Hispanic, Asian, Caribbean
Desired frequency	1/week to 1/month	1-2/month
What would make handling fish easier?	Nothing, or recipe cards	Recipe cards and cooking demos in Spanish
Comments	One pantry received feedback that the sea robin had too many bones. Most pantries noted that recipe cards would not be necessary because their clients are comfortable cooking fish.	Negative feedback was attributed to lack of knowledge of how to handle the fish, including removing the head and tail and scaling. Some noted that the fish had too many bones.

* Estimate provided by food pantry managers.

Though this did not arise in the survey, Food Bank staff did mention that in addition to large Latino and Asian populations, Russians are another of the biggest communities served by Food Bank network agencies, and they are a population that has responded very positively to seafood offerings.

In addition to the survey findings, Food Bank staff noted that anecdotally they did not receive any negative feedback on the any of the three products developed through this pilot (and with strong relationships with their network of agencies, they do receive feedback regularly through a number of channels). Eating with the Ecosystem conducted one cooking demonstration with sea robin in November 2017 at one of the participating agencies, at which customer feedback was resoundingly positive. Eleven participants were surveyed after that demo. Of those, 10 had never tried sea robin before, 10 liked it, and 10 said that if it were available regularly at the pantry they would want to take it to cook at home.

Because rapid redistribution was the distribution approach seen as most suitable for this product in this volume, Eating with the Ecosystem did not have the opportunity to offer

many culinary demonstrations or other on-site marketing for new seafood species as they had intended. According to the agencies surveyed, in most cases, this was not a significant gap. The Food Bank confirmed that they believe that because of the positive response they've received to seafood (in general and in this pilot) and because they have strong in-house nutrition education resources to fill any need that might arise in the future, if this program were to continue, they could likely use any seafood species available.

Though the agencies reported 100% product utilization/distribution over the course of the project, the Food Bank documented a 3.8% disposal rate, including a 210 pound load of scup rejected based on packaging and freezing/defrosting issues (prior to the inclusion of the plastic liner) and a few damaged cases of cod. Product utilization vs. disposal at the household level was not tested as a part of this evaluation, but would be an interesting course of evaluation for next phase of this work.



WHAT WERE THE IMPACTS?

The follow impacts and outcomes are notable for this pilot project:

- Successful supply chain relationships were created that moved over 17,500 lbs of local seafood to Rhode Island emergency food agencies in 2016-2017, including fish subsidized by Eating with the Ecosystem and fish purchased directly by the Food Bank (after the cod napes product "graduated" from the pilot phase).
- Packaging research and development resulted in three new consumer-ready products that feature underutilized species. Processors have an opportunity to explore market potential for these products/packs beyond the Food Bank.
- New audiences for underutilized species were identified, and their demand for lesser known species was confirmed.
- Long term relationships between the state's seafood processing industry and Food Bank were built, and these relationships were experienced as mutually beneficial.
- One product developed as a part of this pilot is now being sold continuously to the Food Bank, without the need for external funding or facilitative support from Eating with the Ecosystem.
- The Food Bank has started thinking through some previously held assumptions about local food industries and new products and partnerships that might be available. (E.g. They assumed that processed seafood might be price prohibitive for them. This pilot proved that it was not.)



CONCLUSION: SUMMARY FINDINGS AND A VISION FOR FUTURE PROGRAM GROWTH

The following key findings from the evaluation influence how this program might grow and change in the future.

- Setting up sea-to-food-pantry supply chains is labor intensive, communication intensive, and research and development intensive. But once established, business relationships can drive continued sales and development.
- Timing is everything. Seafood pricing is volatile, but with purchasing commitments in place and strong relationships underlying those commitments, processors could buy in volume when the price is low.
- Volumes were kept low in order to allow all parties to tinker with packaging and test demand for lesser known species. This was worthwhile, and it accomplished the desired goals. However, both the processors and the Food Bank had to adjust typical operations to accommodate the pilot scale, and this created its own set of difficulties.
- All parties agree that the demand for seafood broadly and for scup and sea robin specifically has been born out: Food Bank agencies and their clients know and love seafood. Exploration of larger scale purchasing of a broader range of species is justified.
- Butterfish and whiting are two species identified as a good fit for this supply chain model and for the market base engaged in this pilot. Customer approval could be tested following the same approach that was followed in this pilot.
- Fishermen's perspectives should be included in future planning to ensure that the prices the Food Bank is paying to the processors enable processors to pay fair prices to fishermen. Initial discussions show alignment, but continued planning with fishermen is warranted, particularly as conditions (such as quota allocations) shift from season to season.



In interviews with processors and the Food Bank, a next phase joint planning approach was envisioned, with significant interest from all parties. In this approach, the Food Bank would sit down with participating processors and their partner fishermen (likely one processor at a time) in order to commit to a target quantity of fish they want to buy over the course of the year, per species, with ceiling prices clearly defined (such as \$1.00-1.50 pound). With those volumes established, the processors could buy and process a range of species over the course of the year when the price is right; they could guide

fishermen toward species they might not otherwise bother to target and land; they could rally their staff around a mission driven program; and they could know with confidence that this fish in this package at this price would have a market in the Food Bank. This pilot project focused on frozen seafood, and the approach outlined above was designed with frozen seafood in mind- the ability to freeze large volumes of seafood then hold and distribute them over time is key to maximizing seafood abundance and pricing shifts.

While fitting the processors' operations better, a planning process like this would also align with procurement planning processes the Food Bank already has in place and would enable the Food Bank to plan around and incorporate seafood even more. The Food Bank strives to keep food purchases to an average of \$.50 per pound, but at the same time, they are constantly striving to create offerings that balance product quality, product diversity, and excellent nutritional mix. Food Bank purchases are made monthly based on plans, but also based on unpredictable influences such as large donations of one product or another that free up budget for other things, or "opportunity buys" that arise. Hypothetically, the Food Bank estimated that they could plan with processors to purchase 100,000 pounds of seafood per year at approximately \$1.00 per pound. At a higher price point, that same volume range might still be possible, because of unique pools of funding that are available for purchasing local food for Food Bank agencies.

The Food Bank has significant freezer capacity and does not anticipate that that would be a limit to greatly increased purchasing and holding of product. They do not, however, hold seafood for longer than a few months (for food safety and quality reasons). This is a potential limit to purchasing in volume for later distribution that should be born in mind.

Opportunities extend beyond Rhode Island's emergency food system as well. The Food Bank works in very close alliance with all other New England food banks and meets with them quarterly. For instance, the Food Bank already works as part of a cluster with the food banks in New Hampshire and Maine, and recently the three committed to sharing the cost of a staff resource who is working with regional farms to identify new local agricultural product options. The Rhode Island Community Food Bank anticipates that regional food banks might have an interest in planning with seafood processors as well- regional coordination could result in offering a highly desirable, pre-tested, and price competitive product to other food banks while maximizing processing scale efficiencies.

While this evaluation revealed that a pricing match can be found and that no external sources of funding for the seafood itself are needed, we see a role for an external third party or focused staff person to leverage pilot project momentum, initiate and facilitate these first joint planning conversations, and spark creative and collaborative problem solving between the Food Bank and the processors. If other New England food banks determine that inclusion of undermarketed regional seafood products are a priority, the aforementioned staff resource focusing on local agricultural product could potentially be leveraged to play this coordinating, facilitative role.

In short, this pilot project, while small, has catalyzed interest in substantially increased engagement between the Rhode Island Community Food Bank and the seafood processors who are its neighbors. It has succeeded in creating a foundation upon which the Food Bank and processors can significantly build.

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This report was researched and written by Shayna Cohen of Karen Karp & Partners as an evaluation for the project.

Eating with the Ecosystem contractors, Julia Bancroft and Dave Rocheleau, coordinated with seafood dealers and the Rhode Island Food Bank to complete this project.

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