
Iowa Independent Grocery Network



Overview

Introduce a statewide initiative and legislation to help strengthen Iowa's independent grocery sector through:

1. Assessments
2. Technical assistance
3. Peer learning

Explore a new grocery self-audit toolkit, bi-monthly virtual learning circles, and technical assistance methods designed to support store operations, procurement, and local sourcing.



Grocery Project Background

How this came to be in Iowa...

Extension Grocery Projects

- 2017 CED began working with tiendas across Iowa
- 2018 included local and regional food connections
- Including:
 - Innovative Rural Grocery Models
 - Midwest Independent Grocery Stores
 - Iowa Independent Grocery Stores
 - Scaling Specialty Crop Processing: Development of toolkit, business tools, and prototypes
 - Mobile Processing Cart



Iowa Grocery Legislation

- Addendum for [legislation language](#): H.F.10321. The purpose of this chapter is to empower farmers, and food entrepreneurs, and grocery stores to provide for strong local food economies that promote self-sufficiency and job growth in the agricultural sector and allied sectors of the economy. Sec.6. Section267A is amended to read as follows: increase the number of jobs in this state's farm and business economies associated with producing, processing, distributing, retailing, and marketing local food.
- Subsection2, Code2025, is amended by adding the following new paragraph: Increase the availability and viability of grocery stores in this state.
- Sec.8. Section267A.2, Code2025, is amended by adding the following new subsection: "Grocery store" means the same as defined in section15.413.1
- Sec.9. Section267A.6, subsection2, paragraphs and Code2025, are amended to read as follows: improve communication and cooperation between and among farmers, food entrepreneurs, grocers, and consumers. Demonstrate the value of processing, distributing, retailing, and marketing local foods.
- [LOCALFOODANDFARMPROGRAM](#)15a. For purposes of supporting the local food and farm program pursuant to chapter 267A:17
- \$125,000 Of the amount appropriated in this subsection, \$50,000 is allocated to the department to support a project conducted by Iowa state university of science and technology to study the ability of the choose Iowa food program, created under section 22187.304, as enacted by this Act, to serve rural grocers
- The department shall enter into a cost-sharing agreement with Iowa state university of science and technology to support the local food and farm program coordinator position as part of the university's cooperative extension service in agriculture and home economics pursuant to chapter267A. Not with standing section8.33, moneys appropriated in this subsection that remain unencumbered or unobligated at the close of the fiscal year shall not revert but shall remain available for expenditure for the purposes designated until the close of the succeeding fiscal year.



Grocery Webinar Series

Issue Focused

Timeline





Grocery Audit Tool

Process for Technical Assistance

Audit Tool

- Audit Tool Process
- Business and Finance
- Procurement and Logistics
- Display and Marketing
- Site Layout

Independent Grocery Audit Tool

Location:

Point of Contact:

Phone:

Email:

Instructions

This audit tool is designed to include a category, "yes or no" checkbox, quantity, and notes section.

1. Respond "yes or no" to a category. For example, purchasing and order methods as a prompt would be answered with yes, or no, if they are applicable.
2. Provide the quantity for that category, when appropriate. For example, how many of that category exist¹. Within the purchasing and order methods, the quantity may either be "1", or you could specify the number of purchasing and order methods by number of cash orders, invoices, online ordering operation systems, etc.
3. Write a description in the notes section. This will provide detail to the strength, challenge, or opportunities for that specific area. In the example of purchasing and order methods, this could include wanting to update the purchasing method to an electronic order system.
4. Describe additional details of the business through the consideration prompts at the end of each section.

Throughout the audit tool, we offer examples in each section for consideration. Some sections may be best completed by management and staff, while others could be done by a third party, customer, or both. These sections will be noted accordingly.

Contact

Iowa State University Extension and Outreach |
Farm, Food and Enterprise Development
contactffed@iastate.edu
extension.iastate.edu/ffed

¹ Note that this will not be appropriate in all sections.

IOWA STATE UNIVERSITY
Extension and Outreach

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Contact

For questions or more information, contact Iowa State University Extension and Outreach Farm, Food and Enterprise Development by email at contactffed@iastate.edu or [visit their website](#).

¹ Note that this will not be appropriate in all sections.

Business and Finance

Item	Yes	No	Quantity	Notes
<i>Example – Purchasing and order methods</i>	X	<i>no</i>	5	1 cash order, 1 invoice, 3 different online ordering from suppliers
Purchasing and Order Methods: Contracts	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Purchase orders	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Spot buying	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Purchasing systems efficiently use technology	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Payments and Invoicing: Procurement cards	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Payment discounts	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Electronic invoicing	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Self-billing	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Point of Sale (POS): POS technology is sufficient for needs of business	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
POS integrates loyalty program	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Human Resources: Annual performance reviews	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

General Business and Finance Considerations

Who is your customer?

Click or tap here to enter text.

Why do your customers choose your store?

Click or tap here to enter text.

How do you determine product pricing for your store?

Click or tap here to enter text.

Procurement and Logistics

Item	Yes	No	Quantity	Notes
<i>Example – Customers request local products</i>	X	n/a	n/a	<i>Periodic requests from customers each month for sourcing from local farmers and food businesses, including apples, honey, tomatoes, bacon, and lentils.</i>
Adequate Product Offerings: Distributors offer a range of products	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
High Standards, Cleanliness, and Food Safety: Specific food safety requirements for distributors	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Clear packaging standards	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Sourcing Local: Customers request local products	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Identified and sourced from local producers and vendors	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Shipment and Packing Standards: Convenient delivery schedule with distributors	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Clear packaging standards	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Pricing practices meet customers' needs	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Food Waste Plan: Food spoilage	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Donate prior to expiration	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

General Procurement and Logistics Considerations

What areas of improvement or areas of growth do you see in supplier partnerships?

Click or tap here to enter text.

Display and Marketing²

Item	Yes	No	Quantity	Notes
<i>Example – Fixtures are clean</i>	<i>nyb</i>	<i>X</i>	<i>All</i>	<i>Staff have been delinquent in cleaning and need to consider new cleaning management or cleaning contract</i>
Fixtures are Clean	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Adequate Product Placement and Display: Use of endcaps	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Effective use of cross-merchandising	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Signage provided and displayed from vendors	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Aisle and front of house marketing/signage	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Products replaced before sell-by date	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Features and promotional pricing attract attention	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Well-stocked; well-faced shelves	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Customer Engagement: Store promotion	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Customer Brand Loyalty: Consistent store brand and messaging	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

General Display and Marketing Considerations

How do you determine customers' needs, i.e. local sourcing, specific product purchase, etc.?

Click or tap here to enter text.

Who is your customer?

Click or tap here to enter text.

Why do your customers choose your store?

Click or tap here to enter text.

² This section could be completed by a third party or customer, or both.

Site Layout³

Item	Yes	No	Quantity	Notes
Example – Deli	n/a	X	All	We have been considering a deli option for to-go offerings to customers. Our community doesn't have many healthy fast options, and this could be a potential value-added business opportunity.
Exterior - Safety Entrances and Exits: Multiple entrances and exits	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
ADA compliance	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Storefront: Clean and attractive signage	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Store hours posted	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Security: Cameras	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Security guards or staff	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Site lines from interior to exterior	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Parking: Available parking	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
ADA compliant parking	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Alternative transportation (i.e. bike rack, electric vehicle)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Interior: Customer exposure to maximum range of products	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Adequate aisle widths for easy shopping	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

³ This section could be completed by a third party, customer, or both.

Item	Yes	No	Quantity	Notes
Department: Deli	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Bakery	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Dairy	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Cheese	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Bulk	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Meats	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Wellness	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Frozen	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Non-foods	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Utilities: Electrical	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Gas	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Plumbing (Water / Waste)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
HVAC	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Shipping/ Receiving: Loading Dock	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Receiving area	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Storage: Dry	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Refrigerated	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

Item	Yes	No	Quantity	Notes
Frozen	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Retail	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Food Preparation	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Processing Equipment	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Food Preparation: Sanitation	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Interior Materials: Good condition of all surfaces and finishes (walls, ceiling, floors, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Additional Site Conditions: Accessibility	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Restrooms	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Expansion space availability	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Standards for cleanliness and food safety	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Safe working conditions with evidence of safety plan, training, etc.	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Interior lighting	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
Exterior lighting	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.
General safety (money safe, security, locks, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	Click or tap here to enter text.	Click or tap here to enter text.

General Site Layout Considerations

Does the loading dock adequately meet needs and provide safe unloading and loading?

Click or tap here to enter text.

What are the interior and exterior improvements that could be made to make your store more welcoming to new customers?

Click or tap here to enter text.

Within departments you currently have, what are the additions you would like to see for customer retention and market opportunities?

Click or tap here to enter text.



TA and Pivot

- 11 TA responses
 - 1 finalized and receiving TA now
- Pivot
 - Deep dive into financials for grocers
 - Video series on demand
 - Site visits to independent grocers from previous work
 - Connecting the audit tool with in-person visits

Thank you & Next Steps

- Finalization of webinars
- Evaluation compiled
- Complete TA and Outreach
- Not refunded, but will remain as a tool

- Contacts:
 - Courtney Long: court7@iastate.edu
 - Lisa Bates: lbates@iastate.edu

