PROCEEDINGS OF THE FUND FOR RURAL AMERICA FORUM OF STAKEHOLDERS TO ESTABLISH

THE NATIONAL CENTER FOR CEREALS AND OILSEEDS

Clarion International Quality Inn at O’Hare
Chicago, Illinois
February 4, 1998
The Cause of the Paradigm Shift:

“The massive consolidation of American Industry, including agriculture, is the consequence of the inability, or refusal, of companies and independent producers to put together systems.”

- H.D. “Harry” Cleberg
  President and CEO
  Farmland Industries

The Consequences of the Paradigm Shift:

“If you’re going to be a serious farmer, you are going to have to be aligned with a processor, a system, and produce to standards. If you aren’t in a system, you eventually won’t have a market.”

- H.D. “Harry” Cleberg
  President and CEO
  Farmland Industries

The Response to the Paradigm Shift:

“A National Center for Cereals and Oilseeds to assist producers, handlers, processors and distributors (including exporters and our overseas customers) of cereals, oilseeds, and processed products, and allied equipment and supply industries to successfully align themselves and participate in the evolving cereals and oilseeds food system of the future through education, information services, technical assistance, and research.”

- Overall Objective of the Fund for Rural America
  National Center for Cereals and Oilseeds
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INTRODUCTION

As part of the Fund for Rural America (FRA) Planning Grant received by the regional project NC-213, Purdue University, and the Grain Industry Alliance (GIA) to establish the National Center for Cereals and Oilseeds, a forum of stakeholders was held in Chicago, Illinois on February 4, 1998.

The objectives of the Forum were to:

1. Review and refine the Center concept and proposed component activities - outreach, technical assistance, research.

2. Identify and prioritize the needs of Center stakeholders and clients.

Invitations to participate in the Forum were sent to over 60 people representing cereals and oilseeds producers, handlers and processors, allied equipment and supply industries, producer organizations, industry associations, land grant universities, state and federal agencies, and private consultants from across the United States. These individuals were identified during several teleconferences among the principal organizers in consultation with other outside contacts in November 1997. Invitations were sent in early December 1997 and follow-up telephone contacts were made in January 1998. The response to the invitation to participate in this Forum was overwhelmingly positive. A total of 48 people from twelve states participated in the one-day Forum. Those who could not accept our invitation did so because of scheduling conflicts.

In preparation for the Forum, a working draft of the National Center for Cereals and Oilseeds proposal was developed and sent in advance to all Forum participants for review. Additionally, participants received an information survey (see p. 5), which they were asked to consider beforehand to stimulate their input in the planned break-out sessions of the Forum.

A schedule for the Forum is enclosed (see p. 6). Dr. David King, Head of the Agricultural Communications Department, Purdue University, served as facilitator of the Forum. Each participant was assigned to one of five breakout session groups, which met concurrently in separate rooms. An attempt was made to create as much diversity within each group as possible.

Discussion leaders and recorders were assigned as follows:

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<tr>
<th>Group</th>
<th>Leader</th>
<th>Recorder</th>
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<tr>
<td>1</td>
<td>Dr. Eluned Jones&lt;br&gt;Virginia Tech University</td>
<td>Dr. Marvin Paulsen&lt;br&gt;University of Illinois</td>
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<tr>
<td>2</td>
<td>Dr. Florence Dunkel&lt;br&gt;Montana State University</td>
<td>Dr. Tim Herrman&lt;br&gt;Kansas State University</td>
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<tr>
<td>3</td>
<td>Dr. Alan Dowdy&lt;br&gt;U.S. Grain Marketing &amp; Production Research Center</td>
<td>Dr. Dirk Maier&lt;br&gt;Purdue University</td>
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<tr>
<td>4</td>
<td>Dr. Charles Hurburgh&lt;br&gt;Iowa State University</td>
<td>Dr. Don Wissman&lt;br&gt;Grain Industry Alliance</td>
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<tr>
<td>5</td>
<td>Dr. Martin Okos&lt;br&gt;Purdue University</td>
<td>Dr. Don Koeltzow&lt;br&gt;U.S. Grain Marketing &amp; Production Research Center</td>
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Each group discussed the same Center activity component and associated set of questions during each breakout session (see p. 7). At the end of the day, the five breakout groups reunited to share their findings and suggestions with the entire group. The discussions and main recommendations are summarized in these Proceedings.

The Forum was organized and these Proceedings edited by:

Dr. Tim Herrman, Kansas State University
Dr. Don Koeltzow, U.S. Grain Marketing & Production Research Center
Dr. Dirk Maier, Purdue University
Dr. F. William Ravlin, The Ohio State University/OARDC
Dr. Don Wissman, Grain Industry Alliance

with clerical support from:

Ms. Kathy Brewer, Purdue University
Ms. Karen Fedovich, The Ohio State University/OARDC
Ms. Karen Wells, Grain Industry Alliance
INFORMATION SURVEY

This series of questions is designed to be discussed by forum participants in advance of the February 4, 1998 meeting in Chicago, Illinois.

1) What are the most serious issues facing farmers/producers that determine profitability of their farm businesses during this transition?

2) How could the National Center for Cereals and Oilseeds help to address these issues?

3) What outreach activities listed in this proposal best addresses the education, training and information needs of Center clients?

4) What outreach needs are not addressed in the current draft for the proposal National Center for Cereals and Oilseeds?

5) What distance learning format would serve you as a prospective client of the Center (Internet, CD Rom, video, satellite conferencing, other)?

6) What technical assistance and consulting services listed in this proposal best address the needs of rural entrepreneurs interested in value-added products and processes?

7) What technical assistance issues are not addressed in the current draft for the proposed National Center for Cereals and Oilseeds?

8) What do you see as the greatest research needs related to value-added cereals, oilseeds and processed products that the institutions participating in the proposed National Center for Cereals and Oilseeds should focus on? On the short versus long-term?

9) What will determine the success of the National Center for Cereals and Oilseeds, and its chances to become self-sustaining past the four years of the USDA-FRA contract?
### FORUM SCHEDULE

<table>
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<th>Time</th>
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<tr>
<td>8:00 a.m.</td>
<td>Introductions - Bill Ravlin</td>
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<td>8:00 a.m.</td>
<td>The View on FRA Centers from DC - Dave King</td>
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<td>8:15 a.m.</td>
<td>Center Overview &amp; Structure - Dirk Maier</td>
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<td>8:30 a.m.</td>
<td>Outreach Component - Tim Herrman</td>
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<td>8:45 a.m.</td>
<td>Technical Assistance Component - Don Wissman</td>
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<td>9:00 a.m.</td>
<td>Research Component - Don Koeltzow</td>
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<td>9:15 a.m.</td>
<td>Break-out Sessions Overview - Dave King</td>
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<td>9:30 a.m.</td>
<td>Break-out Session I - Outreach</td>
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<td>10:45 a.m.</td>
<td>Break</td>
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<td>11:00 a.m.</td>
<td>Break-out Session II - Technical Assistance</td>
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<td>12:15 p.m.</td>
<td>Lunch</td>
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<td>1:15 a.m.</td>
<td>Break-out Session III - Research</td>
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<tr>
<td>2:30 p.m.</td>
<td>Break</td>
</tr>
<tr>
<td>3:00 p.m.</td>
<td>Summation &amp; Where Do We Go From Here? - Dave King, Bill Ravlin</td>
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<tr>
<td>3:30 p.m.</td>
<td>Adjourn</td>
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BREAK-OUT SESSION DISCUSSION QUESTIONS

Break-out Session 1 - Outreach

1. What are the most serious issues facing farmers/producers/handlers/processors of cereals and oilseeds that determine profitability of their respective businesses during this transition?

2. What Outreach activities should the National Center for Cereals and Oilseeds provide to address the education, training and information needs of Center clients with respect to these issues? Consider activities and learning formats listed in the proposal as well as identify any not addressed.

3. How should the Outreach activities identified be prioritized (most important - important - least important)?

Break-out Session 2 - Technical Assistance

1. What Technical Assistance and Consulting Services should the National Center for Cereals and Oilseeds provide to address the critical issues facing Center clients? Consider the activities and services listed in the proposal as well as identify any not addressed.

2. How should the Technical Assistance activities identified be prioritized (most important - important - least important)?

3. To what extent should successful Rural Development Group ventures be expected to contribute reinvestment capital to help fund the Center in the long-term?

Break-out Session 3 - Research

1. What Research activities related to value-added cereals, oilseeds and processed products should the institutions participating in the proposed National Center for Cereals and Oilseeds focus on to address the critical issues facing Center clients? Differentiate between short versus long-term needs.

2. How should the Research activities identified be prioritized (most important - important - least important)?

3. What will determine the success of the National Center for Cereals and Oilseeds, and its chances to become self-sustaining past the four years of the USDA-FRA contract?
SESSION NOTES - GROUP 1

Leader: Eluned Jones
Recorder: Marvin Paulsen
Participants: Pam Bright, Dale Jackson, Michelle Carstensen, Tina Domeier, Gary Hall, Donna Schenk-Hamlin

Outreach

• Critical Issues

Commodity grain markets are shifting to more specialty/IP markets that are consumer-driven.

Consumers are demanding more; meaning processors have to provide more options/quality and processors need more control of raw products going into their process from a food safety standpoint as well as for reducing variability in raw materials.

The processing/milling markets are geographically localized. Any enhanced-value can soon be lost if transportation distance is too great.

We asked why would an industry be willing to share information? The answer was that in a commodity-based market, volume is the driving factor and there is no advantage to sharing information. But when the shift is made to consumer-driven value-added markets, there is an advantage in sharing because what you are sharing is that you have a product that is differentiated in the market place, in a sense you are advertising. One’s competitive advantage comes from having already developed the market chain that supplies high quality raw grains and oilseeds into the process.

• Priorities

There was almost universal citing of needs for information on: quality factors important for each specialty market, processability feedback on how improved quality grains perform in a mill or process, infrastructure (like railroads, other transportation) quality traits wanted by the consumer, measuring techniques for determining quality factors.

From here it evolved that we need a “Virtual Forum” or a platform for communicating the above information across the industry chain. It is likely this is a function that the Center could provide using the Internet. Each grain and oilseed market develops around a local processing plant or buying station that pays a price differential to farmers for delivering specific quality factors. These represents success stories that could be explained and detailed on the internet. Lessons learned by one group likely carry over to other groups. Methods that have been tried and were not successful could be mentioned as something to avoid in the future.

This Center would concentrate on the many localized geographical markets that have developed and what needs to be done to maintain their success. Farmers would benefit by this because they know if they are in a geographical area served by these markets they could receive a price differential. If a farmer is not physically located near an enhanced value market, it does little good to recommend drying and harvesting practices that he has no opportunity to benefit from implementing.
Technical Assistance

In the technical assistance breakout, we talked about the value chain and assistance with business plans and locating venture capital.

Research

• Critical Issues

On the research side, it came down to the fact that a processor asks a technical question very specific to their business. A scientist/researcher may in fact know the answer, but he/she first needs to know something about the process to fully understand what the context and complexity may be, then when he/she gives an answer, the answer often assumes a certain higher level of background knowledge on the part of the person who posed the question. We concluded that much of the time there is a need for a “translator”. The translator is a technical person who has sufficient practical knowledge to fully understand the question being asked and enough technical knowledge to understand the answer being given by any researcher who has the knowledge. The translator in effect bridges the gap between the questioner and the researcher.

• Priorities

The question of how to obtain good translators came up. It was felt that the Center could buy out 25% or more time of a researcher in a specific research area where translation is needed for specific crops. The buy-out might be for 6 months or 1 year so that effectiveness of the person could be assessed. The buy-outs might then be extended for an additional year if it was mutually desirable. So in effect the Center might have a number perhaps 10 to 12 of these translators working in their local states but through internet could be in close contact with those asking questions and those providing answers.

These were some of the major points discussed in Group 1. Good discussion was generated, everyone contributed, and we heard some ideas that reinforced what some of us thought was true and we heard many new ideas as well.
SESSION NOTES - GROUP 2

Leader: Florence Dunkel
Recorder: Tim Herrman
Participants: Bruce Roskens, Gary Anderson, Bob Bennett, Ed Dolecheck, Kent Symms

Outreach

• Critical Issues

Initial concern was expressed that the National Center for Cereals and Oilseeds not build a Trojan horse when the industry was expecting a race horse. Consolidation has occurred in agribusiness because costs got out of control and companies lost their competitiveness. Producers wanting to participate and succeed in value-added marketing opportunities must know about the end-user’s business, what qualities are important and the value of these properties.

Therefore, the proposed Center can facilitate the transition of U.S. agriculture from the old farm program to a more end-use driven marketing system by providing the information, interpretation of this information, and professional training necessary for producers and processors to engage in a more profitable working relationship. This information should link the cost of producing and processing cereals and oilseeds with various quality attributes, thus enabling communication to occur across production, handling, processing and utilization segments of the industry. This can help enhance profitability by taking costs out of the system wherever possible.

The Center can help address these needs beginning with the consumer of cereal and oilseed products and describing their desires as they relate to product qualities and attributes. The training modules and other information should then proceed through the system to the product manufacturer, ingredient processors, storage and handling industry, and finally the producer. Because each customer and processors represents diverse needs, the Center cannot offer a single solution in an education package. Rather, it must provide the flexibility to be relevant to a broad base of customers with diverse information needs.

Other critical issues identified by forum participants included transportation and language barriers. Because transportation changes rapidly based on markets and traffic flow of other (non-agricultural) products, the group did not see a clear fit for the Center; nevertheless, it is an important issue. The lack of a common language, however, seems to be a good fit for the Center. Helping Center clientele understand terms to describe quality would help address some communication issues.

New crops are emerging in the Northern Tier of the United States and with that comes uncertainty about the harvesting and storing activities. Combine settings, optimal storage moisture content, and methods for measuring moisture are not presently addressed by information from equipment manufacturers. A need for information development and making this information accessible is critical as U.S. agriculture becomes more diversified. This should be a function of the Center.

• Information Communication and Interpretation

The forum participants viewed the Center as a clearing house for information. They felt a sense of confidence in the information provided by the Land-Grant Universities that are collaborating in the Center, thus identifying their information as a branded product with a higher value than much
of the material contained in popular trade magazines. The group concluded that any format will work as long as it is available immediately and is current.

Center clientele participating in the learning process should have information presented during annual meetings, via phone calls where information could be accessed and interpreted, and through a virtual network that includes the net and CD ROM. These could be easily converted into printed form as needed.

The concept of the net was that it should link information from all sources in a clear directory. For example, once someone accesses the Center’s home page, they can link to various processing companies to access grain/buying specifications, gather information on how the various attributes included in buying specifications are measured, learn who provides these services, and identify people working in this field.

The net service and Center workshops could help facilitate the alignment process of linking producers and processors since education is key to this activity. This would result in the Center working as a facilitator of change.

• Priorities

Forum participants viewed the Center as a facilitator for change with the central message involving a linkage between all the stages from the producer to the dinner plate.

Another major role of the Center would be assisting Rural Development Groups, outlined more completely in the Technical Assistance component.

Educational materials should be prepared and made available through the Center on how to develop a business plan as well as information on producing, measuring, storing, handling, and processing quality cereals and oilseeds.

Thus, the group concluded that the Center should reach everyone participating in the cereal and oilseed industry on an individual basis with specific information that helps facilitate the rapid changes that are occurring in the U.S. agriculture industry via a virtual information network.

Professional training via workshops and short courses is also important.

**Technical Assistance**

• Services

The Center should provide clearing house service for Rural Development Groups. This should include listings of available contractors, consulting engineers, and pilot-mills where product development, business plans, and engineering designs could be developed.

The Center will be looked to as an information source to provide unbiased information on whether to proceed or stop proposed new ventures based on information and data retrieval pertaining to the nature of the market place, potential return on investment, and the likely success of a new concept based on engineering feasibility.

The steps by which a new RDG would proceed in the technical assistance component as described in the proposal to qualify for free assistance was approved by the group.
Technical Assistance should include assessing the feasibility of new ventures intended for small communities attempting to engage in economic development activities. Often, these communities lack the expertise to evaluate the processes and promises of proposed new ventures that are to be supported by the tax-payers. The Center would provide the technical expertise to assist these communities, evaluate proposals, and enable a higher success rate.

- Priorities

Those representing RDGs at the stakeholders meeting felt the RDGs should be the priority for the Technical Assistance component of the Center. Within that context, stakeholders see the clearing house concept of where to go as a top priority. The issue of services provided to qualified RDGs at a reduced cost or no cost and in a timely fashion was also very appealing among stakeholders.

- Payback

The stakeholders felt that the Center must be self-sustaining and that as RGDs become profitable they should provide renumeration to the Center. However, there was no consensus on how this should occur. Some felt a low interest loan model may work, others liked the idea of royalties.

Research

- Critical Issues

The sense among stakeholders was that research should be something like what larger companies can provide for themselves but that smaller RDGs need but cannot afford. Critical issues include marketing, storage, transportation, grain durability during harvesting-handling-conditioning, investigation into handling and storage properties of genetically modified cereals and oilseeds were discussed. Some discussion of the need for some feeding trials, aquaculture, and perhaps clinical trials for nutraceuticals may also fit with the Center. Some research may be required in the area of processing, such as dry milling, extrusion, baking and marketing for new products developed by RDGs. Again, the Center could serve as a clearing house for information on pilot mills and processing equipment available in the U.S. and provide some assistance in experimental design.

- Priorities

While no clear consensus of topical priorities was identified, the group clearly expressed that research funds should not be used to augment existing research by NC-213 scientists and that it should be driven by needs of RDGs first, and then by industry needs in general. The group of stakeholders did not see a conflict in this area since both RDGs and established firms need research that enables them to better meet customer needs.

- Success and Sustainability

Characteristics of success by the Center include:

- revolving pay back
- successful RDGs
- research that is driven by real issues facing RDGs.
SESSION NOTES - GROUP 3

Leader: Alan Dowdy
Recorder: Dirk Maier
Participants: Scott Fritz, Charles Sopher, Jim Stitzlein, John Crabtree, Paula Ford, David Berck, Jim Christianson

Outreach

• Critical Issues

Group 3 identified as the most serious issues facing farmers, producers, handlers and processors of cereal and oilseeds logistics and the transportation and associated freight costs of crops from producer to end-user. Food safety was mentioned as another critical need that needs to be addressed by this Center. It was pointed out that we need to learn to produce what the market wants, what consumers want, and realize the reversal of what we used to think and that is “from dinner plate to farm gate” instead of “from farm gate to dinner plate”.

In terms of quality, we need to understand what processors want in terms of quality attributes. Often times the marketplace cannot supply these desired attributes. Thus, new varieties of cereals and oilseeds are needed. Disease problems and yield drag are still major concerns with regard to breeding programs. Additionally, the handling and storage infrastructure for specialty grains are not necessarily in place for segregation of grains to feed a supply system in large enough quantities.

Another issue is the availability of capital and technology. Capital is largely tied to depreciation which can hold back modernization among some groups, while it will allow other groups to leapfrog ahead of their competition. We also know a lot, have done a lot of research, and many technologies are available but we lack technology transfer efforts that put these new technologies in a usable form for producers, handlers and processors.

It was also mentioned that capital is more than dollars. Capital also involves societal capital, education capital, and networking capital, in the form of universities, producers, research organizations and end-users.

It was also mentioned that outreach is a poor term, which implies one way communication and should be replaced with “education and information exchange that is participating and iterative”. “Stakeholders” may also be a poor term as it can imply selfish motivation for the control of dollars.

Several questions were raised regarding how RDGs can compete with large multi-nationals. Are there viable niches, can the producer and the “big guy” compete together? Can this Center tailor to both RDGs and the “big guy”? The Center needs additional focus for it was unclear whether the Center will primarily help the small start-up or who they are here to serve. How will the Center select which economic development activity to support? Some have the resources to pay for technology assistance already.

The question was raised whether the Fund for Rural America was targeted at everybody vs. targeting the Center activities to specific groups of people, such as the family farm and the rank and file producer. A good idea for certain individuals in terms of outreach activities may not be good for the global population as a whole. What we are proposing in this Center needs to be a
worthwhile effort. The Center needs to enhance the capacity of the target audience to utilize information effectively vs. traditional content-based extension education. The goal for the Center is to have a sustained impact on rural economies. Although traditional methods of extension education and outreach activities are worthwhile the Center needs to be cautious about simply pumping out more information in the form of publications that might be duplicative of what is already available.

It was identified that feedback from technical assistance of the Center into the education of the target group is critical to the success of the Center. The lessons learned in technical assistance need to be communicated quickly and effectively to the target groups. The functions of a clearing house is critical to the educational activities of the Center. It can serve the vital communication linkages between producers and end-users and any intermediates. We need to realize, understand and appreciate the challenges that each partner faces in the evolving food system for cereals and oilseeds. Can enough value differentiation be generated in this new system to make it pay for each participant?

• Priorities

One focus of the outreach activity of the Center should be to enhance the capacity of RDGs to access capital. The organic farming concept was also mentioned as an opportunity. Diversification of production may need to be considered that is sustainable, while the term “niche marketing” may be a misleading term.

Marketing information was listed as one of the primary issues and needs of education activities. Marketing information needs to be made user friendly and digestible so producers and smaller producer groups can utilize the information more readily.

Outreach activities also need to go beyond the traditional programs. We need to reduce the costs associated with information transfer in an iterative process.

Another important function of the Center in terms of its clearing house activity might be to save a lot of dollars, frustration and subsequent despair by producer or producer groups or rural development groups by helping to deflect ideas and avoid them from going forward and going broke. It was mentioned that the Grain Exporters Association uses a simple questionnaire for any so-called “UFO” Direct Marketer that needs to realize the difficulties associated with marketing a product overseas.

The focus of the Center needs to be on systems and processes rather than product components. What process will be utilized to deliver the outreach activities? Such items as what are the basic ingredients of what it takes to start a company, to market a product, to get credit, are critical to the Center’s educational activities support.

The Center in its early phase needs to also further define education needs before addressing them. We already have some information and some experiences on the developmental activities of RDGs. The technical assistance component will allow the development of RDGs laboratories which will allow for a systems approach rather than a component approach to successful business development.
In terms of training techniques, multiple formats were suggested. Interactive multimedia and video conferences serve one type of customer. The use of end-users as trainers in terms of train-the-trainer workshops was suggested as an important aspect for educational training activities.

The Center should serve primarily as an information clearinghouse rather than generate more content information. Focus on linking people to existing and newly available content information.

Workshops on hot topics need to be leveraged for support with other groups such as producer groups, industry groups, association groups. It is important that the Center actively works at breaking down state and institutional lines to allow collaboration and cooperation between those who have knowledge in the area of cereals and oilseeds and value-added processing. It was suggested that the outreach component might be renamed “Education and Information Services”.

**Technical Assistance**

- **Services**

  It was mentioned that some farmer cooperatives are already going out of state to hire unbiased private consultants to come in and conduct feasibility studies for their new ventures. A concern was raised as to how and to what extent this Center will mix public and private funds. It was mentioned that entrepreneurial ventures can be jump-started with venture capital and the Center could function as a link between venture capital and good project ideas.

  Pilot food processing plants exist in both the private and public sector and that the Center needs to tie into these in order to succeed with technical assistance activities. The technical assistance components should look at overall system needs of an RDG. The focus should be on new qualified companies and start-ups. The Center is to be a conduit and a middleman to the network of expertise and resources throughout the United States.

  The private sector will often come together on issues of common concern (environmental, waste, etc.). The private sector will not cooperate on competitive issues that relate to improving specific quality attributes of their products. Technical assistance can help RDGs find money support, as well as how and where to market their product. The Center should function as an information source on where to go and who will conduct the best feasibility study. Someone may already have tried something and sharing of that experience and information is critical to newcomers. An example of a critical issue for a new start-up company is what market penetration number to use in a feasibility study.

  Concern was also raised about the regulatory and legal issues that the Center may or may not want to be involved in. In the discussion it was clarified that even public institutions, such as universities and research organizations, are unlikely to donate their time and expertise without being properly compensated.

  In the overall Center proposal it should be emphasized that education, research and technical assistance have the synergy and need to be tied together in feedback loops. Again it was emphasized that RDGs through the technical assistance activity of the Center become living laboratories from which experiences need to be fed back into the educational activities in order to pass along the experiences learned.
• Priorities

The primary focus of the Center in terms of technical assistance should be:

1. Screen and select qualified RDGs that are most likely to succeed.
2. Put a technical assistance and consulting team together with the necessary funds to launch the RDG.
3. Assure that the information learned from the RDG venture gets fed back into the education and research activities to benefit the next RDG project.

Program priority setting teams need to include end-users, producers and other clients of the Center. Technical review teams need to help set priorities and define the funding needs.

• Payback

There definitely should be an expectation to pay back if an RDG is successful. There should be no charge by the Center to the RDG for services during the initial stages of development. However, once the RDG becomes successful it should be expected to pay back funds, may be not with interest.

Research

• Critical Issues and Priorities

User-driven aspects have to be most prominent in deciding what research to undertake by the Center. Research has to be driven by economic concerns of the end-users. The Center should primarily function as a facilitating network. The Center should not actively be involved in its own research. Research may focus on which RDG to encourage and which to discourage. Research may focus on what is the “big” picture. There should not be any support of traditional core funding of NC-213. However, funding might be used to determine the direction of future research through scoping studies and forums.

A question was raised whether we needed a research component for the Center at all. Research demonstration that is more applied in nature seemed to be most important. The demand today is for applied research. Everyone is after that.

The Center may also function as a sounding board to identify long-term research needs and prioritize them. Research funds might be used for scoping studies and short-term investigations that are applied as well as to identify and set long-term research direction. Setting aside 20% of Center funds for research appeared reasonable.

The Center needs to highlight the value of user input that is passed on to identify long-term research needs. We need to assure there is a mechanism in place for research to be fed back into technical assistance and education.

• Success and Sustainability

One advantage of the Center is that it will encourage multi-disciplinary and inter-disciplinary teams to form and respond more readily. Research of the Center is viewed as going well beyond the traditional NC-213 expertise.
The question was asked whether the Center will function based on competitive grants entirely in its three components. A model such as the IPM-CRISP with technical review committees to help direct priorities of the Center activities was suggested. A management entity with technical reviewers to decide funding priorities needs to be put in place.

The Center needs to be money- and funding-conscious and leverage its activities consciously right away with other groups and organizations. The issue of sustainability needs to be addressed from the time the Center starts. The use of Center funds needs to assure geographic and demographic representation, as well as balance between large and small users of the Center.
SESSON NOTES - GROUP 4

Leader: Charles Hurburgh
Recorder: Don Wissman
Participants: Ed Bergschneider, Jim Watson, Arvid Hawk, Frank DeGennaro, Bill Lemon

Outreach

• Critical Issues

Transition from current commodity-based system to a product-based system via the market system. There is a need to conceptualize the system. Proprietary needs of marketers.

ARS research available – but need is for interpretation to local situations. Questions on sustainability of all these new markets – do we get geared up for a product and see the market disappear?

If we make the focus of the Center’s outreach activities too broad it will be too broad to be successful. Must narrow it down. Washington did not do its duty when they consolidated the proposals of GIA, NC-213 and Purdue.

What does the farmer/producer really need to know? We have been working on new markets for several years and farmers will get a share. A processor indicated that a farmer doesn’t need to get involved in markets. We need to know how to justify change in operations.

Will the Center be a clearing house of market information? Processors can go to the producer and say “will you grow this for me?” Processors will not share purchase information. This would put them in conflict with the Center. It is a very complicated system.

Look at what research information is available. Is there value in a national data base? There are research data bases out there that can be used.

What information is needed by the farmers? Do we know how to market a genetically modified product? Is it a good market or do we grow it because we know how to grow it? Do we know how good the market is? How segmented is the market?

Farmers need to know their possibilities, such as how to grow, where to get seed, what yield can be expected, the value of the crop, can we pay for the equipment, and how to make money. The Center needs to help producers maximize income.

How do we justify changes in operation? What are the key steps to profit maximization. How does producers/growers know what to produce?

How does the RDG fit in with the large companies? Maybe they can contract with large companies for this final product. The large companies can purchase the successful ones.

A county elevator in our area built the largest metal grain storage site. How does that fit in? Maybe the best answer would be advise not to build it.

• Priorities

Yes, the concept of the Center is needed by small groups unless we want to go the way the poultry producers and pork producers have gone.
Yes, we need unbiased background information.

We need a tabulation of market opportunities (clearing house). Promote matchmaking (allowing the information user to know who to call).

How do we make more informed decisions? Go talk with the local elevators and processors.

Center cannot function as a merchandising Center because of very limited resources.

Present proposal is unfocused. Need to limit the Center functions. De-emphasize large scale educational effort. Cannot cover the waterfront.

Center needs to promote an awareness of the information base of GIA-NC 213. Keep it simple. It can be an information pipeline.

**Technical Assistance**

- **Services**

  My boss gets heartburn when we start promoting one group over another. Public employees may not want to respond. An Indian group in our area could never get any money to complete a feasibility study.

  The Center could:

  Focus resources on a RDG, build a team to assist, design options, and provide technical assistance

  A problem will be how do you decide who gets the TA. How would we prioritize? Size of opportunity, likelihood of success, market opportunities, and local impartial assessment. Can we get leverage using state funds or other matching funds? Can help RDG fill out applications for state funding. How sustainable is the Technical Assistance system? We could require a partial payment. We need to develop some sort of repayment process (there is no free lunch). Successful ventures are expected to pay back.

  The assistance may reduce the cost of capital for RDG.

  The advantages of technical assistance are that it can draw upon a broad knowledge base, lacks bias, and has distance from political forces/effects.

  This could be to the advantage of large firms as they could buy successful small companies or contract with them. Can it also help existing businesses?

- **Priorities**

  The TA component should have an impartial review board not associated with the Center. Such a panel could be selected from this Forum group.

**Research**

- **Critical Issues and Priorities**

  Need value differences for outputs. For example, difference between oil from extrudes vs solvents. What are different characteristics? How do you determine them? What is the value?
How do you market the product? Need information on certification process. For example, have developed a crank case oil but API (American Petroleum Institute) won’t approve it or even test it. Another example is what are the handling/harvesting needs of specialty grains? What kind of speciality handling needs are required for new processes? What are the needs of specialty grains, such as storage criteria, drying specifications, analysis (what tests), and quality control requirements.

Is that TA or research – dividing line difficult to determine in some cases.

Who pays for research? Large companies pay if it benefits their process.

Research is also needed on agronomic performance data including methodology, long-term performance, and procedures and standards.

We also need standardized data/testing/reporting methods. Whose job is it to set data standards, i.e., what is 5 percent oil?

These requirements will balloon as specialty crops increase. Thus, there is a need for economic analysis/forecasting so that we can be confident in the markets that are out there. For example, how do you identify/handle round up beans vs other beans?

Research needs to be linked to rural economic development.
SESSION NOTES - GROUP 5

Leader: Martin Okos
Recorder: Don Koeltzow
Participants: Tim Dufault, DeEtta Bilek, Wendell Harvey, Warren Barnes, Ron Marl, Terry Keeneth

Outreach

- Critical Issues

Who keeps the margins as food moves from the farm to the plate? How are we going to deal with the distribution of the margins? How does the producer capture more of the margins? Producers need to find a replacement for government subsidy dollars now that the safety net is being removed. Knowing what to grow is an important issue. A 5% over supply usually drops the price by 50%. How can the producers know what is needed such as high oil corn, specialized protein soybeans, etc. in a timely manner? The Internet may drastically change the marketing system. Now you can buy your groceries on the Internet. In a survey of corn producers, many said that they are already looking at the Internet as a marketing tool.

As technology develops more rapidly, having access to this new technology is a major issue. How and who will pay for the new technological developments such as genetically modified plants, alternative processing techniques, and different marketing strategies?

Farmers need to produce more products designed specifically for certain markets. Producers have only so much time and field days and effective methods for providing needed information on the specific products are needed. We need to develop and enhance producer-researcher-consultant-trainer ties and relationships. In addition, the producer needs to maintain equity ownership of what they produce longer in the food chain.

We need a “trusted advisor” who can sift through the mountain of facts and provide good information concerning what is needed in the market place and the risks associated with meeting these needs. The producers need consultants and other information sources. How the information is delivered is as important as what is said. One group member was definitely not in favor of using video tapes. Information on the market size, who is buying, and what the crop is used for is needed.

Producers need to investigate adding more value to what they make rather than just trying to produce more. Producers definitely need help in getting through the transition from a paradigm of producing more (increased yields) to one of producing better. What happened to sugarbeets is a good example of what needs to happen in cereals and oilseeds. As long as producers were paid for beets by the ton, there was no consideration of sugar levels. Now sugarbeets are purchased on the basis of the amount of sugar content and producers are looking for high sugar yielding varieties as well as increased numbers of tons. We’re talking about restructuring the grade measurement/payment system for cereals and oilseeds. This change must be consumer-driven.

- Priorities
We need to educate the producer on the total value of what is being produced. Corn stover is a good example. This is a good source of pulp fiber for the paper industry and might replace as much as 50% of the paper fiber that comes from trees. Stover is a product that is not even considered in most farm economic evaluations. There are many examples of this. However, care must be taken to evaluate all of the ramifications of converting these items into profit. If significant soil erosion results from selling these materials, we can be in significant trouble. We need to establish a value for things like soil fertility. We need to help growers audit what they are throwing away.

The best outreach mechanisms are forums. CD ROMs won’t work. Most liked the idea of an Internet site/bulletin board.

One group member likes interchanges with people and, therefore, was also in favor of forums, workshops, and regional training sessions. These could be piggy-backed along with other conventions and meetings. It is important that the Center provide the framework for networking with other organizations. Forum and workshop information could be sent through these organizations.

It is vital that the communication go both ways. The Center must LISTEN to feedback from the producers and to the needs of the consumers. The Center should be an established communication life line.

Group members also expect the Center to inform the producers about the risks associated with recommendations.

All agreed that the Center should make use of ALL available avenues for disseminating information. The group felt that all of the outreach activities were very important and did not feel that they could prioritize them.

**Technical Assistance**

- **Critical Issues**

  One important component of the development of new processes is a pilot plant feasibility study. These require rigorous analytical capability, economic analysis, etc. Since the funding of the Center is limited, the Center should assist the RDG with locating the needed expertise to conduct such studies.

  Identify the location and inventory of needed equipment.

  Provide general plant process design assistance. Specific design details can be purchased from the private sector.

  Generate ideas for processes and products that need to be explored.

  Develop an inventory of potential customers or buyers of new products.

  Provide specifications for customer needs.

  Provide information on economic feasibility, legal, personnel management, and cash flow and return issues.
Provide information on and assistance with regulatory, state legal, and accounting issues that are important to the RDGs in the development of their new ideas.

Provide information on how to locate potential investors.

Provide training on how to do business plans, security law, etc. This should be a mini MBA program. What issues should the RDGs watch for?

The persons providing assistance to RDGs should have had industry experience. Make sure that in providing advice people with industry experience are involved.

MENTORING - find a group of experienced people who could serve as mentors in the start-up of the new business. Have the Center involved in helping hire the financial, personnel, and legal expertise needed to run the new venture.

Prepare a list of potential and experienced people who could serve on the Board of Directors of the new company.

Group members liked the written feasibility study section of the proposal. In general, the Center should serve as a clearing house of what needs to be done and who should do it in starting the new business venture.

In summary, the Center should act as a clearing house of information for what needs to be done and how to do it. It should also provide assistance on how to get these things done through a MENTORSHIP program.

- Priorities
  - First priority should be the business planning and mentorship program along with providing information on resources and funding availability.
  - Second priority should be given to product and process development including a review of current work and an inventory of resources needed.

- Payback
  - Two methods for obtaining funds should be used. Group members were in favor of the Center having a set percentage (say 5%) ownership in the new company. The second fund source should be services for a fee.
  - One important comment that was made was that the Center should be legally defined so that it could accept ownership in these ventures.
  - The Center also can/should assist RDGs with their applications for additional grants. For example, Minnesota has rural development grants available to cooperatives.

Sustainability priorities were:

1. Stock options (company ownership)
2. Service for a fee
3. Cost sharing (leveraging) of funds.
Research

• Critical Issues

The research institutions involved in the Center should identify the unique and special qualities/functional properties that are related to end-use performance and provide the tools that are needed to measure these qualities at the first point of sale. In the past, yield increase has dominated research work. Now work should focus on end-use quality development in the various crops.

Average products are no longer good enough. We need to provide better quality products with MORE CONSISTENCY.

A consumer research clearing house function is needed where clients can obtain information on such things as the changes in diets that are taking place in Asia, for example.

Research is needed on SMALL SCALE processes, which are decentralized. This can help to lower transportation costs.

The Center should determine what research has been done by members of such groups as the American Oil Chemists Society or the Institute of Food Technology.

Group members wanted a broader focus than what was being covered by NC-213 research organizations.

• Priorities

Most Important
1. Serving as a Clearing House of research information.
2. Development of SMALL SCALE processes

Important
1. Measurement of end-use functional properties
2. Minimizing the raw material and product variability
3. Development of nutritional concepts
4. Consumer needs research

Least Important
1. Understanding process efficiency
2. Developing novel nutraceuticals
3. Understanding process/ingredient interaction

• Success and Sustainability

Two measurement tools should include the number of successful businesses launched, and the number of potential unsuccessful ventures that are discouraged.

The RDGs should be selected very carefully.

An important success factor will be the RESPONSIVENESS of the Center in meeting client needs. This can be measured through the use of client surveys. One note of caution was that the application process for Center services should be kept short.
Another important success measurement tool will be close tracking of the funding schedule. Is the Center on track with the development of additional funding?

Other potential signs of Center success are the number of new jobs created, or the number of new bushels of crops sold or acres planted.
SUMMATION

Group 1

- The Center needs to become an entity that fosters communication among producers, handlers, processors, consumers and customers within the cereals and oilseeds system. The old system of buying and selling commodity crops needs to change to one of growing and selling of crops that end-users want.

- Technical and research needs need to be identified. Mapping the value chain from the producer to the end-user requires expertise in relationships and how to value these relationships. Questions such as is this process sustainable, what are the weak links that need to be strengthened, where is the value, need to be answered.

- Producers, handlers, processors and customers need better access to research information that already exists. The Center needs to engage qualified “translators” to facilitate communication between customer and researcher. The Center can function to overcome multiple databases. The Center can connect customers with researchers and vice versa.

- The Center needs to overcome state-line barriers, focus on maintaining successful localized markets, help to leverage funds, and coordinate research efforts throughout the entire new system.

Group 2

- The Center needs to facilitate, stimulate and help to develop communication linkages across the cereals and oilseeds food system. It should function as a clearing house of information.

- The Center needs to be consumer-driven. RDG projects should drive Center activities. Entrepreneurs struggle often as to where to go with their great ideas. Dreamers are out there and need help to be put in touch with the right people and resources.

- How do we get the word out about this Center? Land-Grant Universities, the Internet, grower associations, and media coverage will help spread the word about Center activities.

Group 3

- The Center must serve as a clearing house that does not duplicate but facilitate existing materials and efforts.

- Outreach must use a systems approach, be interactive, and involve two-way communication. Rename as “Education and Information Services”.

- End-users should be enlisted as trainers and educators within the Center structure.

- Educational activities need to be linked with technical assistance and research activities with a focus on the end-user, as well as leveraged with other groups.

- Technical assistance serves as a primary mechanism and driving force for all Center activities.

- Technical assistance has to feed into education and research. RDGs are laboratories and test cases for others to learn from.
• Technical assistance should primarily involve identifying qualifying RDGs, facilitating consulting teams to work with the RDGs, and then to link experiences of successful and unsuccessful RDGs back into outreach and research activities.

• End-users need to drive a systems-based approach to research.

• Research should be short-term and responsive and feed into long-term research needs to NC-213 and other organizations.

Group 4

• Focus and sustainability are key to the success of the Center, which must function as a clearing house.

• Large scale information efforts are diffuse and should be avoided. Instead specific projects with demonstrable benefits should be the target of education activities.

• Technical Assistance efforts must prioritize which RDG to fund by evaluating the size of the opportunity, the likelihood of success, the market opportunities, and the local impartial assessment.

• Generic research activities need to be avoided. Research needs to be closely tied to technical assistance. Issues that are critical need to be addressed.

• The structure and procedures for the Center need to be reconsidered. We need to maximize input into the highest success projects to have something to show for quickly.

Group 5

• The Center should be an INFORMATION CLEARING HOUSE which establishes communication links among all members of the food chain from producer to consumers. A trusted advisor giving honest and unbiased information about the risks associated with new ventures is critical. The relationship between end-user and producer is a two-way street. Technical solutions may be easy compared to running a business. The Center can function in a mentor relationship and with a lot of hand-holding help to manage the business of a RDG successfully.

• The Center should offer business planning in the form of a MENTORSHIP PROGRAM. Center activities need to be end-user driven. An end-user is any user of a product developed by the Center. The focus should be on the entrepreneurship of RDGs. Attention needs to focus on the consumer. Consolidation in the agricultural industry is due to cost being out of control. Supply-chain management involves taking costs out of the system. The Center needs to help RDGs be responsive to consumer needs. The Center needs to help start-up RDGs to understand which part of the value-chain they own, and that they understand how to manage it, and that they can justify being in it.

• The Center should develop FUNDING MECHANISMS for repayment/reinvestment into the program so that the Center does not disappear at the end of the grant. In terms of communication about the Center there is little disagreement in this group on what should be done. However, there was more disagreement on how it should be done.
Final Remarks

In his final remarks as a facilitator, Dr. David King mentioned that throughout the day a mixture of traditional vs. non-traditional views regarding Center activities in terms of education, technical assistance and research were discussed. Dr. King recommended a book entitled “The Death of Distance”. It’s main point is that today, geography is not an issue anymore. Communities of people with like-minded interests can network anywhere in the world. The National Center for Cereals and Oilseeds has the opportunity to break-down boundaries in order to conduct business in a different way. Dr. King also suggested to add a communication person to any Board of Trustees or Center management structure in order to help communicate effectively the education and information services, technical assistance, and research activities of the National Center for Cereals and Oilseeds.

What We Heard

Here is what we, the Forum Organizers, heard you, the Forum Participants say:

1. The Center should be first and foremost a Clearing House of trustworthy, objective, unbiased information on value-added cereals, oilseeds and processed products that establishes a communication network among all members of this newly evolving food system. The Center needs to engage qualified “translators” to facilitate this communication.

2. The Center should be engaged in interactive, two-way, targeted education of producers, handlers, processors, consumers, and allied equipment and supply industries by providing relevant educational materials and professional continuing education opportunities. The focus should be on business planning, end use quality, value-added processing, and risk management within the cereals and oilseed food system.

3. Technical Assistance should focus on identifying, screening, and selecting qualified RDGs that are most likely to succeed, assembling consulting teams with the necessary funds to successfully launch RDGs, and assure that gained experiences (positive and negative) from these business ventures get fed back into the information network of the Center. Projects should have a positive rate of return.

4. The Center should offer Technical Assistance in the form of feasibility analysis and business planning through a mentorship program to stimulate entrepreneurship, and to assure that Rural Development Groups succeed, and that their experiences are shared within the system.

5. The Center should develop Funding Mechanisms for repayment/reinvestment from successful RDGs to assure sustainability beyond the FRA contract.

6. The Center should focus on Research that is applied and short-term to support member-driven education, technology transfer, and technical assistance. It should assist with identifying and prioritizing long-term research needs, and communicate those to the appropriate research organizations. Although very necessary as part of broader programs, generic and diffuse benefit research is not part of the Center.

7. The Center must use a systems approach that is end-user/clientele/consumer-driven.
8. The Center must facilitate not duplicate.

9. Education, Technical Assistance and Research must be linked together through effective Information Services.

10. The Center should focus on maximizing its input of resources (labor, funds) into those educational, technical assistance, and research projects with the highest probability of success and the highest visibility of impact on rural economic development. Whenever possible, the Center should leverage its resources with those of other organizations.

11. The “virtual” National Center for Cereals and Oilseeds will serve a community of people with like-minded interests in this newly evolving food system that can network throughout the U.S. and the global marketplace.

ACKNOWLEDGEMENTS

The Forum organizers would like to thank each participant who took time out of their busy schedules to review the working draft of our proposal, actively participated in the Forum, and provided invaluable input to the discussion that took place. Your suggestions have greatly improved the final draft of the proposal to establish The National Center for Cereals and Oilseeds through the Fund for Rural America. Thank you also to Ms. Karen Fedovich, The Ohio State University/OARDC, Ms. Karen Wells, Grain Industry Alliance, and Ms. Kathy Brewer, Purdue University, for their assistance in making the necessary preparations to successfully host this Forum.
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