

Finding and Buying Local Foods

Introduction to Procurement

February 4, 2016



Welcome!



Today's Speakers



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Housekeeping

- To make a comment or ask a question use the *chat* function.
 - » You can submit a question or comment at any time.
- **This webinar will be recorded.** Both a PDF of the slides and a link to the recording will be available on the Office of Community Food System's website:
<http://www.fns.usda.gov/farmentoschool/webinars>
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Setting goals and Establishing an Evaluation Baseline

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Attached as downloadable files you'll find a copy of the presentation and handouts.

- All webinars in this series are being recorded and will be added to our website as soon as possible.
- Find the evaluation toolkit from Spark Policy here: [Evaluation Toolkit](#)
- Join us for the next webinar in our series!

Finding and Buying Local Foods: February 4,

Details

Date: Thu, Jan 28, 2016

Time: 02:00 PM EST

Duration: 45 minutes

Host(s): Carmen Quizon

Downloadable Files

[Setting Goals and Benchmarks...](#)

[FTS Eval Goals&Benchmarks ...](#)

[FTS Eval Goals&Benchmarks ...](#)

Presenter Information

Bob Gorman



THE
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The USDA Farm to School Planning Toolkit



Questions and Resources for
Designing a Robust Farm to School Program

United States Department of Agriculture, Food and Nutrition Service

www.usda.gov/farmtoschool



Defining Local and Finding Local Foods

Serving local foods through school meal programs is often a central component of farm to school initiatives. But before schools and districts start purchasing local foods or determine which local foods they are already purchasing, they must determine what foods are grown, harvested, raised, caught, and processed in the region and when those foods are available. Knowing these things about the surrounding agricultural landscape can help schools and districts take the critical step of defining "local." The questions below are meant to help you survey your local agriculture and help you develop a definition of local that works for you.

Local Sourcing Questions to Consider

Definition of "Local" or "Regional"



Buying Local Foods

Once a school district has defined local and determined some sources of local foods, it's time to start purchasing them! When local foods are being procured using federal meal program funds, those purchases must be done in accordance with regulations. The questions and resources below are meant to help you establish a plan for procuring, or procuring more, local foods in accordance with the rules. You will be encouraged to think through possible mechanisms for purchasing local foods; address distribution and delivery challenges; and survey your capacity to store and process local products.

Local Procurement Questions to Consider

Background and Progress to Date

How much local food do you currently serve? What types of local food have you been purchasing, and from whom? Through which Child Nutrition Programs do you serve local foods?

Tip! Count your local foods purchases in terms of total dollars spent and percentage of dollars spent. If you don't know where the food you've been purchasing comes from, you should think about how you'll start collecting that data since it's important to have a baseline figure. If you want to explore farm to school data collection in more depth, see the [evaluation questions and resources](#).

To date, what local procurement-related activities have you participated in?

Local Procurement Goals

What are your near-term (1 to 2-year) goals for local foods procurement? What types of local foods do you hope to serve and how often do you hope to serve them? Do you plan to serve local foods through all of the Child Nutrition Programs you operate, or just some of them?

TIP! To the extent possible, your goals should include specific target amounts and products.

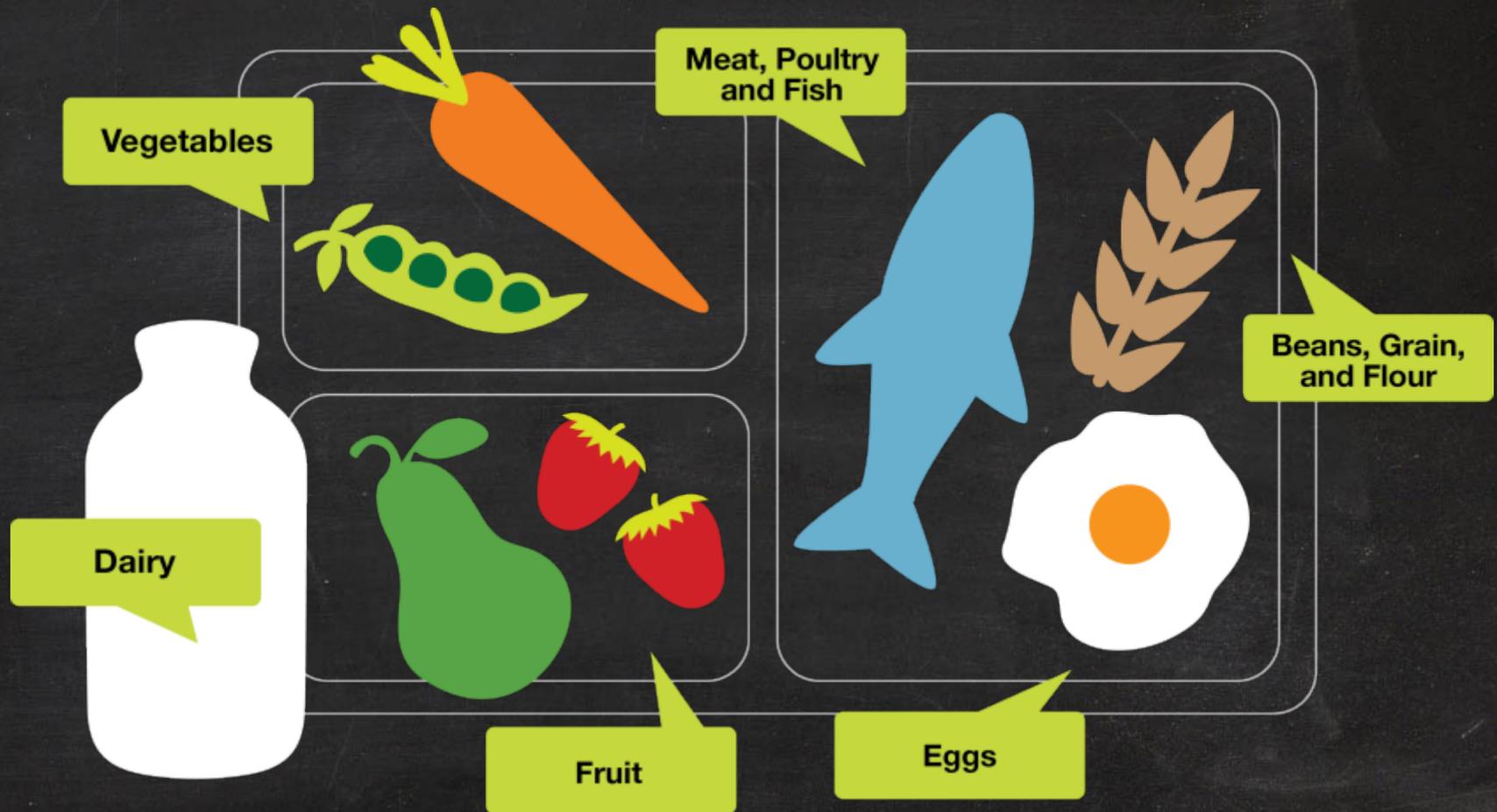
Overview

- What is local?
- Procurement principles and methods
- Opportunities for targeting local products
- Resources and questions

What is Local?



What Types of Products?



What Does Local Mean?

Who defines local?

- School food authorities

What are you trying to accomplish?

- Is there state based legislation regarding local purchasing that you'd like to be aligned with?
- Do you want to bring as much local product as possible onto the menu as quickly as possible?
- Do you want to couple local purchases with farm visits and have personal relationships with suppliers?



What Does Local Mean?

- Within a radius
- Within a county
- Within a state
- Within a region

A district's definition of local may change depending on the:

- Season
- Product
- Special events



Poll: How do you define local?





How to Buy Locally and Correctly!



Procurement Regulations

- Have a purpose, really!
- Help you get the best quality and price
- Leave room for flexibility and innovation

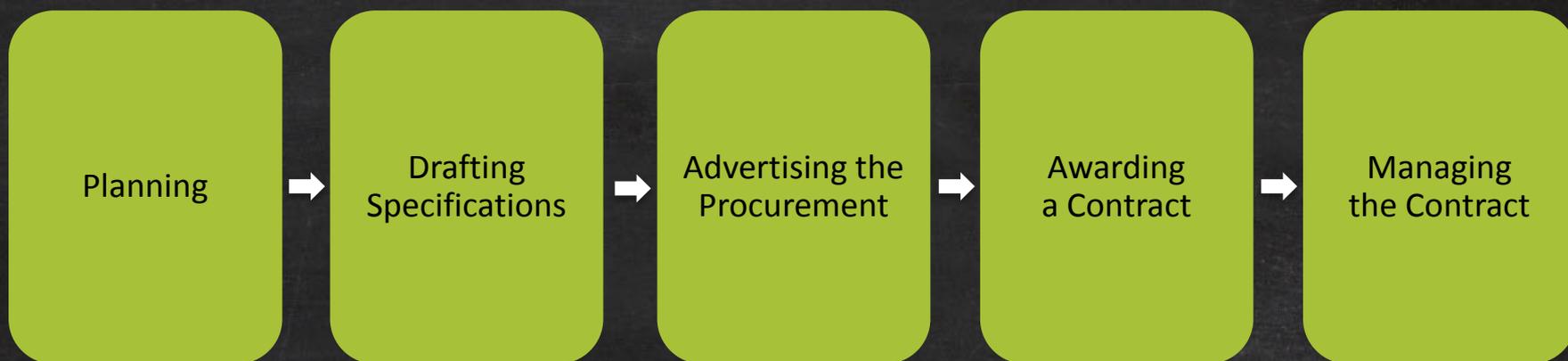
Why are Procurement Rules Important?

- To ensure that program benefits (and taxpayer dollars!):
 - » Are received by eligible schools and children
 - » Are used effectively and efficiently, with no waste or abuse

What Is Procurement?

Procurement is the purchasing of goods and services.

The procurement process involves:



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4 Key Concepts

- 1) American Grown
- 2) Knowledge of State and Local Regulations
- 3) Competition
- 4) Responsive and Responsible



1

The Buy American Provision

The National School Lunch Act requires schools to purchase domestically grown and processed foods to the maximum extent practicable.



2

Procurement Rules

- Be familiar with all procurement requirements, at the federal, state and local levels
- Schools are responsible for complying with all levels of regulations.
 - » In some cases, state and federal regulations may be in conflict with each other.



3

Competition

Competition is essential to ensure low cost and good quality of goods and services.



Competition Killers

Do not...

- Place unreasonable requirements on firms;
- Require unnecessary experience and excessive bonding;
- Give noncompetitive awards to consultants;
- Have organizational conflicts of interest;
- Specify only brand name products; or,
- Make arbitrary decisions in the procurement process.
- **Use local as a specification**



4

Responsive and Responsible

Awards must be made to vendors that are responsive and responsible:

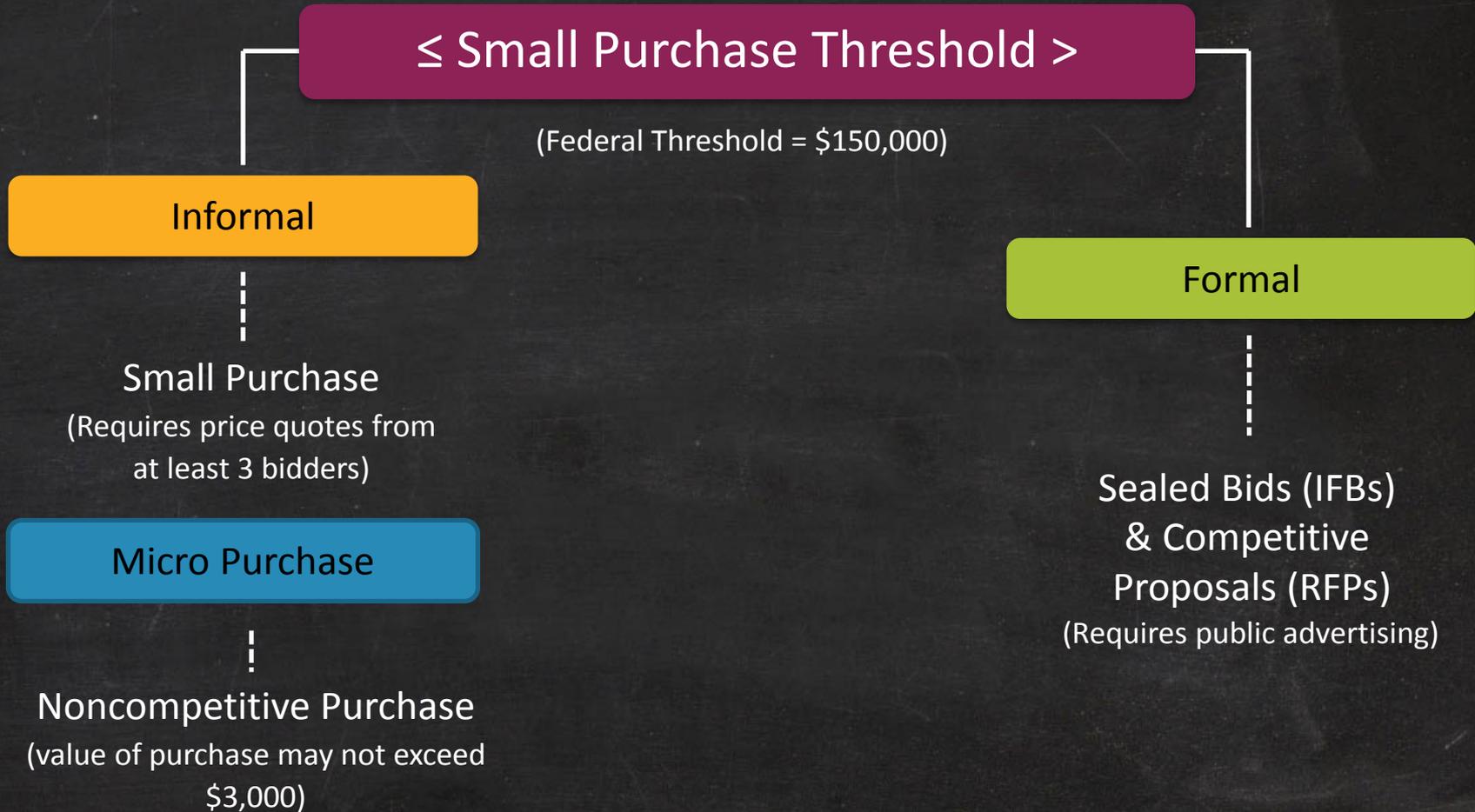
- Responsive means that the vendor submits a bid that conforms to all terms of the solicitation
- Responsible means that the vendor is capable of performing successfully under the terms of the contract



Procurement Methods



Procurement Methods





Micro Purchase

Use it when:

The aggregate value of your purchase falls below the micro purchase threshold of \$3,500. Micro purchases enable schools:

- To purchase supplies or services without soliciting competitive quotations, if the school considers the price reasonable.

When using the micro purchase option, schools must:

- Distribute micro-purchases equitably among qualified suppliers;
- Develop written specifications and required terms, conditions, and contract provisions; and,
- Document all purchases.

The Informal Procurement Process





“Three Bids and a Buy”

Develop a Specification

- Green apples, US. Fancy or No. 1, prefer 5 185 count boxes per week but willing to consider other pack sizes for Sept-Dec.

Solicit Bids

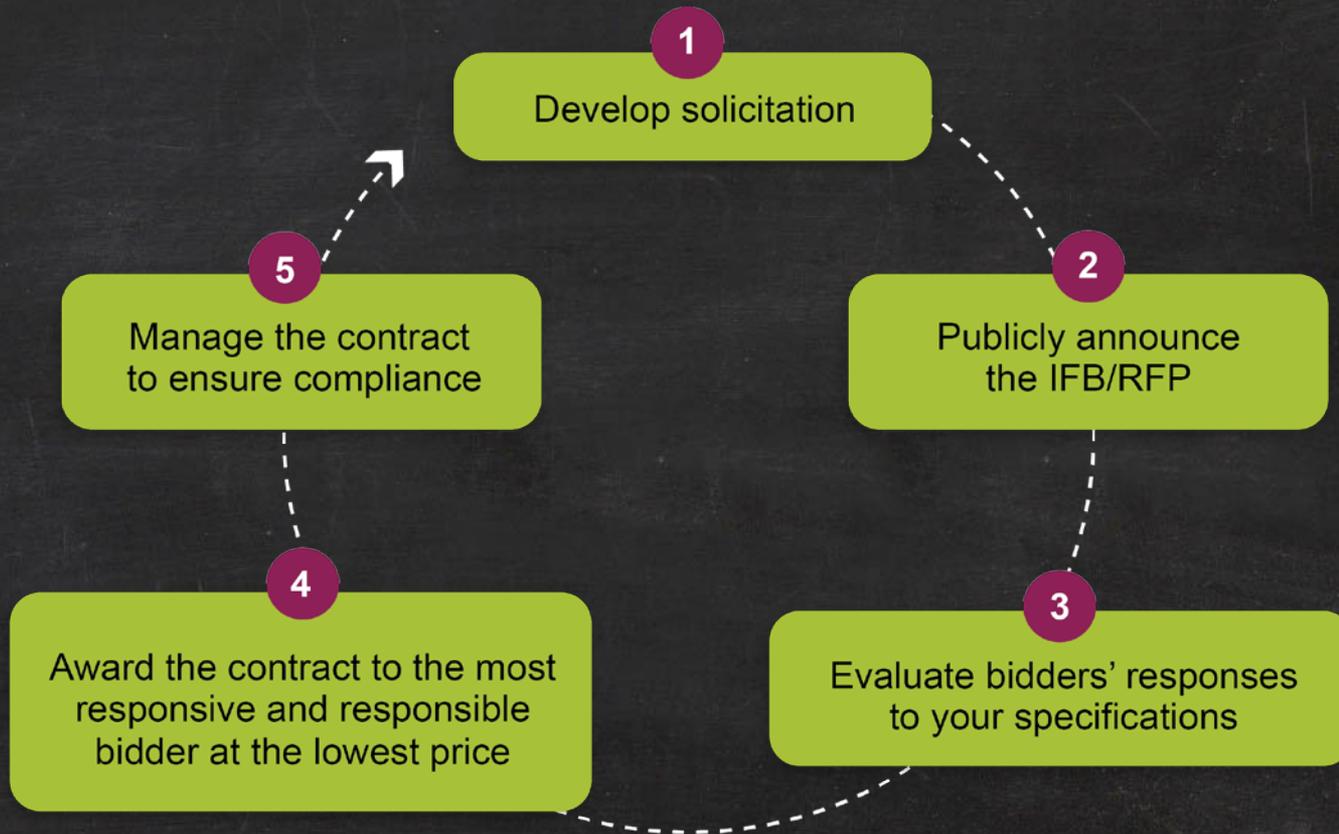
- Contact [ONLY LOCAL](#) vendors (by phone, fax, email, in-person or via mail); provide them w specifications (or if calling, read same information to each vendor)

Bid Documentation

- Write down each vendor’s bid and constraints; then file it.

Vendor	Art’s Apples	Olivia’s Orchard	Apple Crunch Inc.
Price/box	\$40	\$47	\$37

The Formal Procurement Process



Competitive Sealed Bidding

Procurement by competitive sealed bidding is done by issuing an invitation for bid (IFB).

Use it when:

- A complete, adequate, and realistic specification is available.
- The contract can be awarded on the basis of price.

Competitive Proposals

Procurement by competitive proposal is done by issuing a request for proposal (RFP).

Use it when:

- Conditions aren't appropriate for a sealed bid.
- Price won't necessarily be the sole basis for the award.

Opportunities for Targeting Local Foods





Sections of a Solicitation

- Contract Type
- Introduction/Scope
- General Descriptions of Goods and Services (AKA Specifications)
- Timelines and Procedures
- Technical Requirements
- Evaluation Criteria



Sections of a Solicitation

- Contract Type
- Introduction/Scope
 - » Ex. Farm to school is a priority and want to include as much local as possible. Our goal is to serve 20% local products.
- General Descriptions of Goods and Services (AKA Specifications)
 - » Ex. Product specifications
- Timelines and Procedures
- Technical Requirements
 - » Ex. Determine responsive and responsible vendors
- Evaluation Criteria



Use Product Specifications and Technical Requirements to Target Local Products

- A school's interest in purchasing local (and the broader context of its farm to school program) can be expressed in the introduction to a solicitation.
 - » Remember: a school may not specify that it wants only local products
 - » A school may indicate its desire to serve local products and emphasize the importance of their farm to school program.



Example: San Diego Unified, CA

Vendors will provide products:

- Delivered directly to multiple SDUSD school sites (not a central warehouse). The number of drops is to be determined by the district on a case-by-case basis;
- Produce should be generally free from insect damage and decay; and,
- Product must be rinsed, cleaned and packed in appropriate commercial produce packaging, such as waxed cardboard boxes. Standard industry pack (case counts) is required and/or half packs are allowable when it comes to bundled greens.



Example: San Diego Unified, CA

Vendors will provide products:

- **Grown on farms that are less than 50 acres in size;**
- **Grown on farms that grow more than five food crops at one time;**
- **Grown on farms that utilize a majority of hand harvesting, hand packing or human labor power in growing, harvesting, and packing of food;**
- Delivered directly to multiple SDUSD school sites (not a central warehouse). The number of drops is to be determined by the district on a case-by-case basis;
- Produce should be generally free from insect damage and decay; and,
- Product must be rinsed, cleaned and packed in appropriate commercial produce packaging, such as waxed cardboard boxes. Standard industry pack (case counts) is required and/or half packs are allowable when it comes to bundled greens.



Farm to School Resources



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Resources

- Geographic Preference Q&As
- Federal procurement regulations
- State and local procurement rules and guidance
- Washington State Department of Agriculture Guide
- Institute of Child Nutrition - Online Training
- Finding, Buying and Serving Local Food Webinar Series

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United States Department of Agriculture



10 FACTS ABOUT LOCAL FOOD IN



United States Department of Agriculture



GEOGRAPHIC PREFERENCE

What it is and how to use it



United States Department of Agriculture

DECISION TREE: How Will You Bring Local Foods into the Cafeteria with Your Next School Food Purchase?



LOCAL can't be used as a product specification in a school food solicitation, but there are many ways to buy local products. This chart presents several options for including your desire for local foods in the procurement process.



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Thank You!
Questions?



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Upcoming Webinar:
Farm to School Menu Planning
February 18, 2:00 PM EST

