

Procuring Local Foods

For Child Nutrition Programs

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Welcome!



Overview

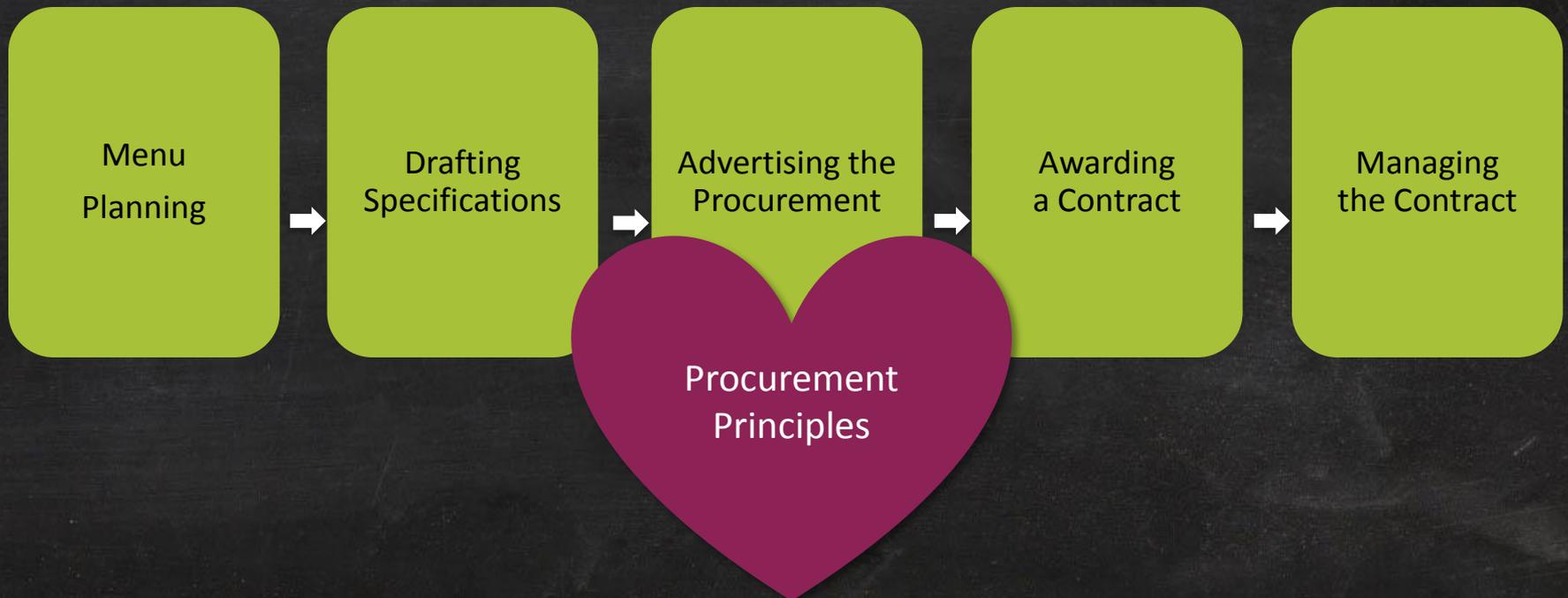
- Procurement 101:
 - » Procurement basics and key concepts
 - » Procurement methods
- Procuring Local Foods:
 - » Defining local and sources for local foods
 - » Targeting local w/ Informal & Formal methods
- Resources
 - » CT Procurement Technical Assistance Program (PTAP)
 - » CT Department of Education



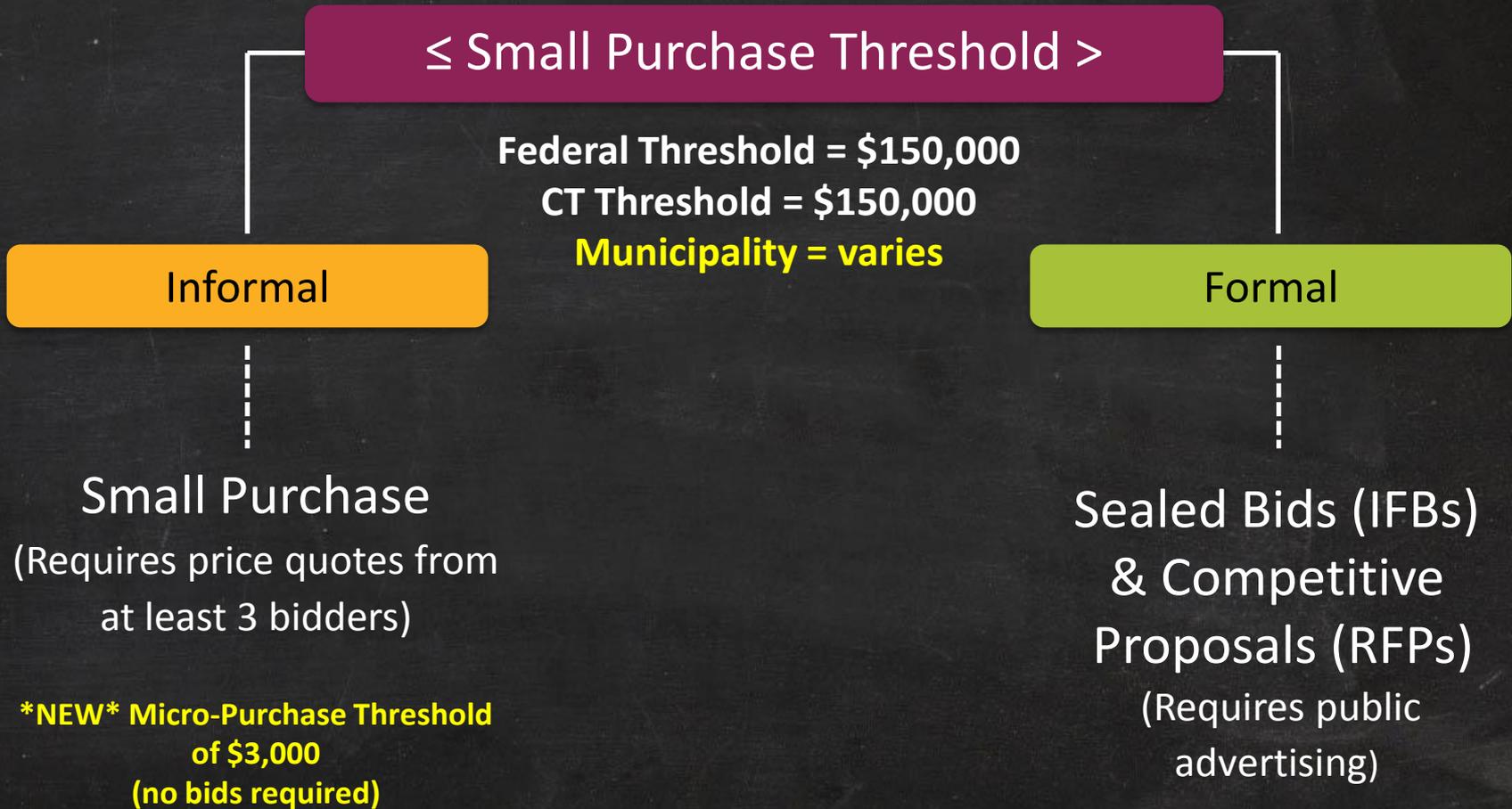
What Is Procurement?

Procurement is the purchasing of goods and services.

The procurement process involves:



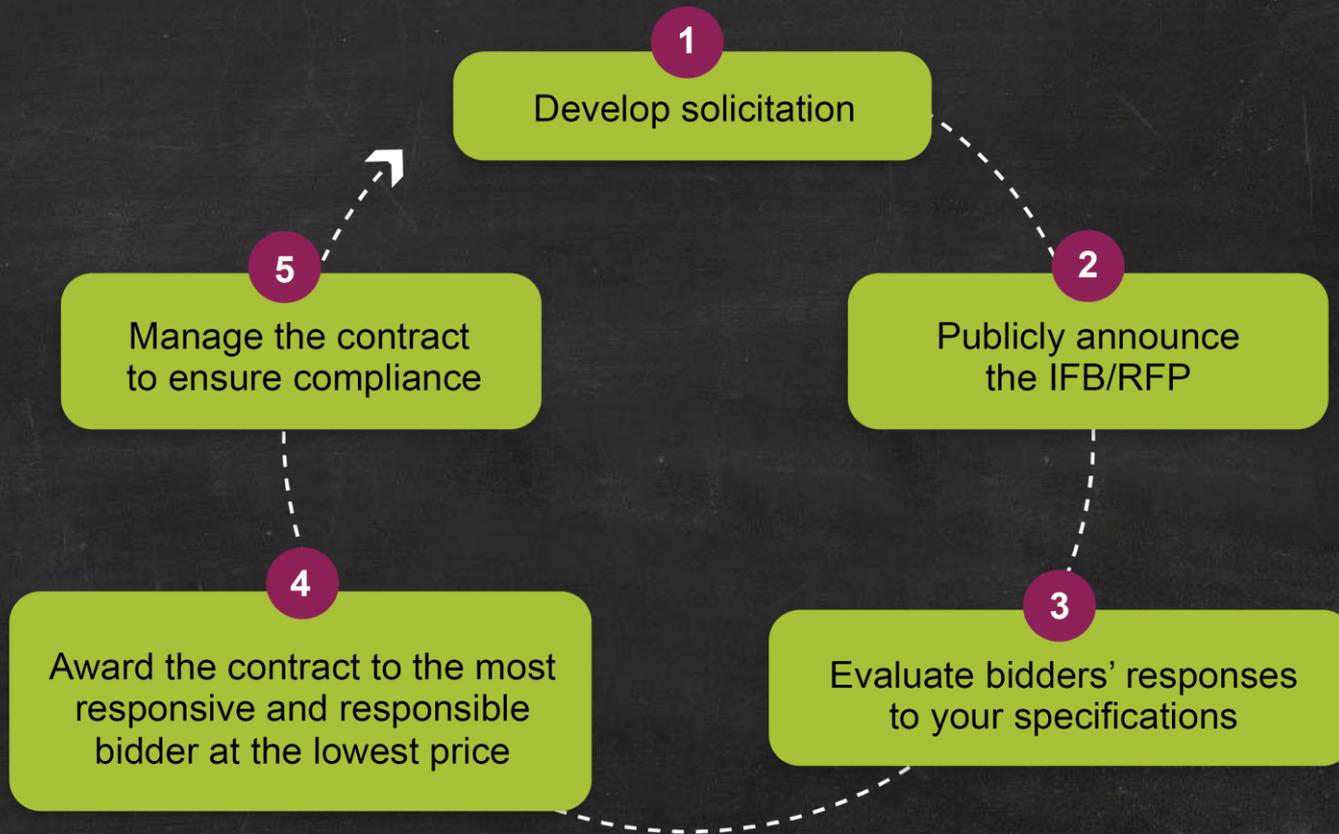
What Method Do I Use?



The Informal Procurement Process



The Formal Procurement Process





Splitting Procurements

- SFAs cannot arbitrarily divide purchases to fall below the small purchase threshold.
- SFAs should bid out their full needs for the school-year
- In some instances, however, characteristics of a product or market justify the need to separate it from the overall food procurement.

...such as Harvest of the Month programs, taste tests, products for a Farm to School Month promotional event.



3 Key Concepts

- 1) Competition
- 2) Knowledge of Federal, State, and Local Regulations
- 3) Responsive and Responsible Vendors

1

Competition

Competition is essential to ensure the best **PRICE** and **QUALITY** of goods and services.





2

State and Local Procurement Policies

- SFAs must be aware of and comply with federal, state, and local procurement regulations
- CT- Federal and state thresholds are the same; municipal may be more restrictive
- The most restrictive threshold applies



3

Responsive and Responsible

Not just price! SFA must be made award 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.



Competition Killers

Do not...

- Place unreasonable requirements on firms;
- Require unnecessary experience;
- Give noncompetitive awards to consultants or vendors;
- Have organizational conflicts of interest;
- Specify only brand name products;
- Make arbitrary decisions in the procurement process;
- Write bid specifications that are too narrow and limit competition;
- Allow potential contractors to write or otherwise influence bid specifications; or,
- Provide insufficient time for vendors to submit bids.
- **Use local as a product specification.**

Why are these rules in place?

- School food must be purchased in a competitive environment to ensure that program benefits (and taxpayer dollars!):
 - » Are used effectively and efficiently, with no waste or abuse
 - » Are maximized for the benefit of eligible schools and children

When do procurement rules apply?

- All purchases made with federal dollars:
 - » purchases made with federal reimbursement dollars
 - » purchases made through the Unprocessed Fresh Fruit & Veg Pilot



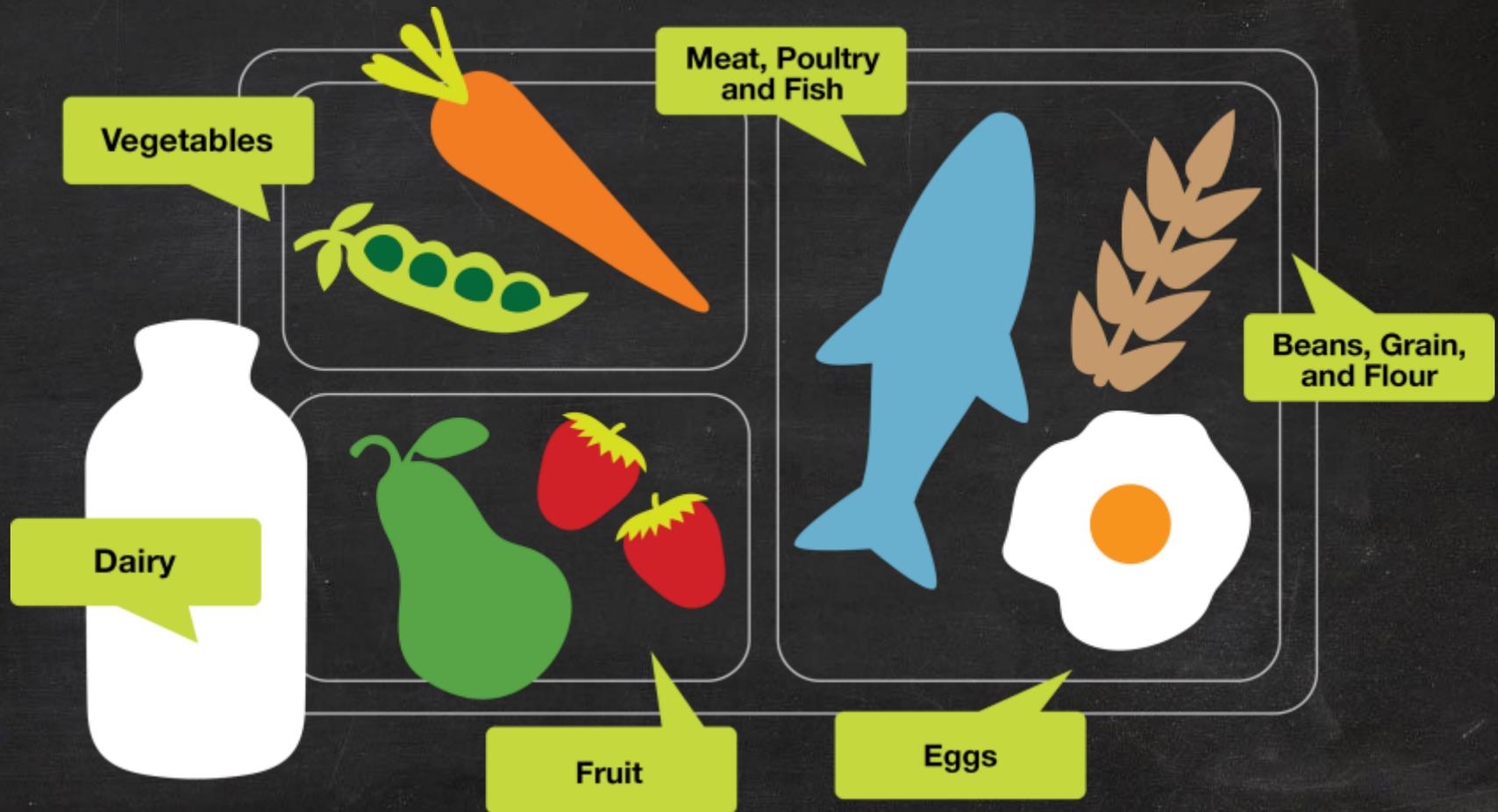
Section Summary

- Procurement is a process, not a one-time event
- Informal vs. Formal Methods and when each is used
- Ensure competition
- Federal, State, and Local Procurement Policies
- Bidders are evaluated for price, but also for whether they are responsive and responsible
- Local cannot be used as a requirement.

How SFAs Define Local & Target Local Foods



What Types of Products?



What Does Local Mean?

Who defines local?

- School food authorities



How?

- Within a mile radius
- Within a county or state
- Within a region

Local Production & Seasonality Resources

- Conversations with farmers and other producers
- Visits to the farmers market
- Outreach to Cooperative Extension agents
- Outreach to state agencies - CT Department of Ag
- Outreach to USDA- Farm Service Agency
- Outreach to districts that have sourced locally
- USDA Farm to School Census
- USDA Census of Agriculture
- Seasonality charts, crop calendars





For more information Contact:
 Connecticut Department of Agriculture
 165 Capital Avenue
 Hartford, CT 06106 (860) 718-2608
<http://www.ct.gov/sa.gov>



CONNECTICUT GROWN CROP AVAILABILITY CALENDAR

CROP	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Apples									
Asparagus									
Beans									
Beets									
Blackberries									
Broccoli									
Cabbage									
Cantaloupe									
Carrots									
Cauliflower									
Cherries									
Cucumbers									
Eggplant									
Garlic									
Greens									
Herbs									
Leeks									
Lettuce									

CONNECTICUT GROWN CROP AVAILABILITY CALENDAR

CROP	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Artichokes									
Artichokes									
Onions									
Peaches									
Pears									
Peppers									
Pickles									
Potatoes									
Raspberries									
Squash									
Squash									
Sweet Corn									
Sweet Corn									
Tomatoes									
Tomatoes & Tomatoes									
Turkey									
Winter Squash									



<http://www.swhacct.org>



THE FARM to SCHOOL PROGRAM

Sources of Local Foods

- Through distributors
- Through food service management companies
- Direct from farm
- From producer co-ops/ food hubs
- From school gardens



What's *Already* Local on Your Menu?

- Look at your records.
- Ask your suppliers whether they purchase local products.

What *Could* Be Local?

- Conduct a menu audit.
 - » Are there items that could easily be replaced with local products?
- Think about ways to integrate.
 - » Harvest of the Month program
 - » New recipe development
 - » Salad Bar
 - » Seasonal Cycle Menu
- Include tracking of local in future contracts.

Not sure where to start?

Requests for Information (RFI):

- Survey the market to understand:
 - » Quantity available
 - » Price point
 - » Seasonal availability
 - » Willingness to work with schools
 - » Whether geographic preference is necessary
 - » Who the producers are!
- Collaborate with surrounding districts
- Work with a community partner

Local as a Product Specification

- “X District is soliciting bids for Connecticut-grown products.”
- “This RFP is restricted to producers from within the state.”
- “We are soliciting bids from producers within a 100 mile radius.”
- “Only products grown within a 75 mile radius will be accepted.”

What the Legislation Says

Section 2403 of the 2008 Farm Bill says:

*“The Secretary shall allow institutions receiving funds under this Act ... to use a geographic **preference** for the procurement of unprocessed agricultural products, both locally grown and locally raised.”*

Local as a Preference

- “X District operates a Farm to School Program, and prefers to support local and regional producers.”
- “We seek opportunities to incorporate local food into our program whenever possible.”
- “Preference will be given to vendors that can document source of origin, and procure product from within the state.”

Targeting Local in an Informal Procurement



THE
FARM *to* SCHOOL
PROGRAM



“Three Bids and a Buy”

Develop a Specification

- Red Apples, US. No. 1, five 185 count boxes per week 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



Informal Method: “Three Bids and a Buy”

Develop a Specification

- Red apples, US. Fancy or No. 1, prefer five 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) and provide them with 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



CT DOE Informal Bid Template

School District Name Here

School Nutrition Department

INFORMAL QUOTATIONS

School Year 2014-2015

DATE: _____ Term of Agreement: _____

PRODUCT: _____

Specifications for product: _____

Quantity of Product: _____

Delivery Requirements: _____

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Vendor/Farmer: _____ Phone: _____
Contact Person: _____ E-mail: _____
Date called: _____ Date written quote received: _____

Price: _____
Comments: _____

PURCHASE? Yes No If no, why?

Vendor/Farmer: _____ Phone: _____
Contact Person: _____ E-mail: _____
Date called: _____ Date written quote received: _____

Price: _____
Comments: _____

PURCHASE? Yes No If no, why?



Targeting Local in a Formal Procurement



Ways to Target Local Products through Solicitations

1. Define farm to school program in your introduction
2. Use product specifications
3. Use additional requirements to determine vendor responsiveness
4. Apply geographic preference in the evaluation of bids



A decorative border at the top of the slide features a repeating pattern of white line-art icons on a dark background. The icons include carrots, piggy banks, and stylized plants.

Sections of a Solicitation

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



Include Your Desire for Local in the Introduction

- A school's interest in purchasing local products (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 its farm to school program.

Introduction Language with Local Emphasis

The Food Service Department (The Department) at the Cypress Creek District in Colorado works to provide the highest quality meals to its students. Cypress Creek serves about 15,400 school lunches every day and the free and reduced price rate is 73%.

The Department prefers to source locally when possible, and its farm to school program works to connect K-12 schools and local food producers to improve student nutrition, provide agriculture and nutrition education opportunities, and support local and regional farmers.





Product Specifications to Target a Local Item

SFAs may request:

- A variety that is unique to the region
- Product delivery within 24 or 48 hours of harvest



Example: Use Product Specifications

Product Specification

- Red Apples,
- US. Fancy,
- Five 185 count boxes per week for September - December





Example: Use Product Specifications

Product Specification

- <McIntosh or Macoun apples>
- US. Fancy or No. 1,
- Prefer five 185 count boxes per week but willing to consider other pack sizes for September – December
- Delivered within 48 hours of harvest



Additional Requirements to Determine Vendor Responsiveness

- SFAs will evaluate vendors for price, but also to determine that they are responsive and responsible.



SFAs can ask for:

- » Freshness (e.g. Delivered within 48 hours)
- » Specific size of farm
- » Harvest techniques
- » Crop diversity
- » Source of origin labeling
- » Ability to provide farm visits or class visits



Incorporate a Geographic Preference

- 1) Define local.
- 2) Determine what type of procurement method to use.
- 3) Decide how much “preference” local products will receive.
- 4) Be sure your solicitation makes perfectly clear how the preference will be applied.

Example 1: 1 Point = 1 Penny

	Owen's Orchard	Apple Lane Farms	Bob's Best
Price	\$1.97	\$2.05	\$2.03
Meets geographic preference? (10 points)	No	Yes (10 points)	No
Price with preference points	\$1.97	\$1.95	\$2.03

10 points will be awarded to bids for apples grown within 100 miles of the school board office.





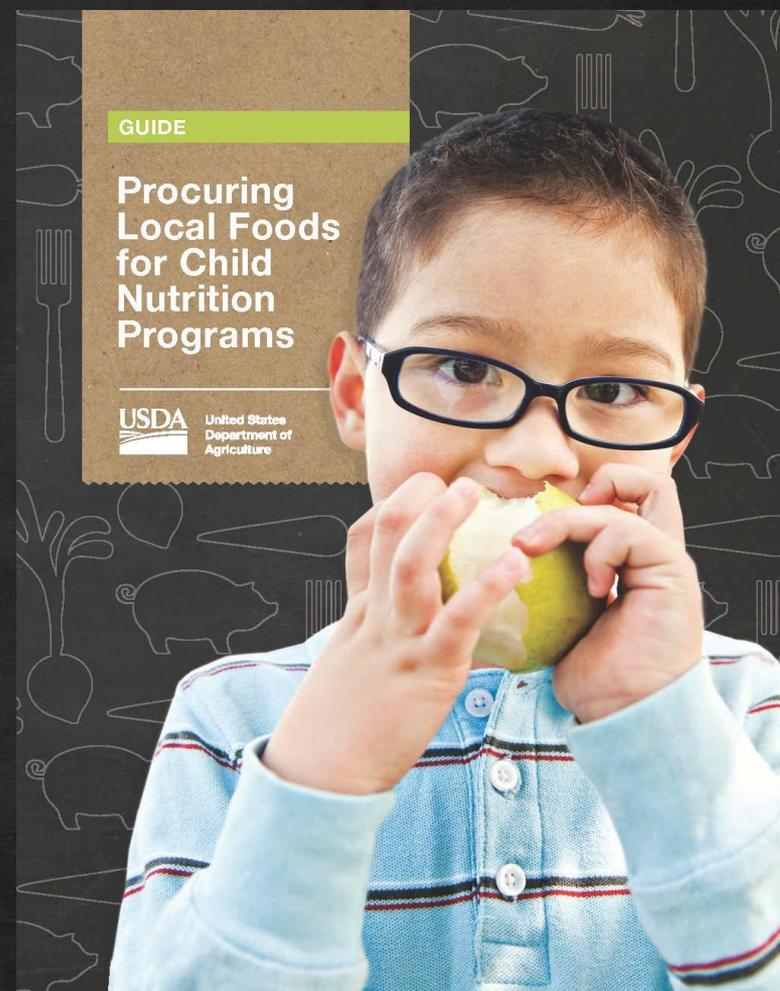
Section Summary

- SFA defines local
- Local product can be targeted in both the informal and formal methods
- Local must be cited as a **preference**, not a **requirement**
- SFA can encourage local sourcing in the introduction of a solicitation, product specification, vendor requirements, or geographic preference to target local foods.

FNS Procurement Resources

Local Procurement Guide and
Webinar Series:

<http://www.fns.usda.gov/farmtoschool/procuring-local-foods>



Thank you! Questions?

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