PRODUCER WORKBOOK

AGRICULTURAL PRODUCERS' TOOLKIT

Bringing the Farm to School

BRINGING THE FARM TO SCHOOL

USDA

NCAT NATIONAL CENTER FOR APPROPRIATE TECHNOLOGY

NATIONAL FARM to SCHOOL NETWORK

PRODUCER WORKBOOK

Bringing the Farm to School: Agricultural Producers' Toolkit

— Table of Contents —

I. BRINGING THE FARM TO SCHOOL

How to Use This Workbook

If you are attending a producer training in your state, you will see that each section in this workbook corresponds with a module from the training. Each section in this workbook covers a different aspect of selling local food products to schools. The modules are meant to be worked through in the order they are presented, however the workbook is still easy to use as a reference to look up specific concepts after you have completed the training. The worksheets located at the end of each section are designed to help you gain confidence with the material covered in that module and set you up with some action steps in moving forward with selling to schools.

Key Terms: Language can be tricky when trying to sell to schools. The glossary in Appendix B on page 62 will help you learn key terms to use when working with School Nutrition Directors. These key terms are located in a side bar of each section in this workbook for easy reference.

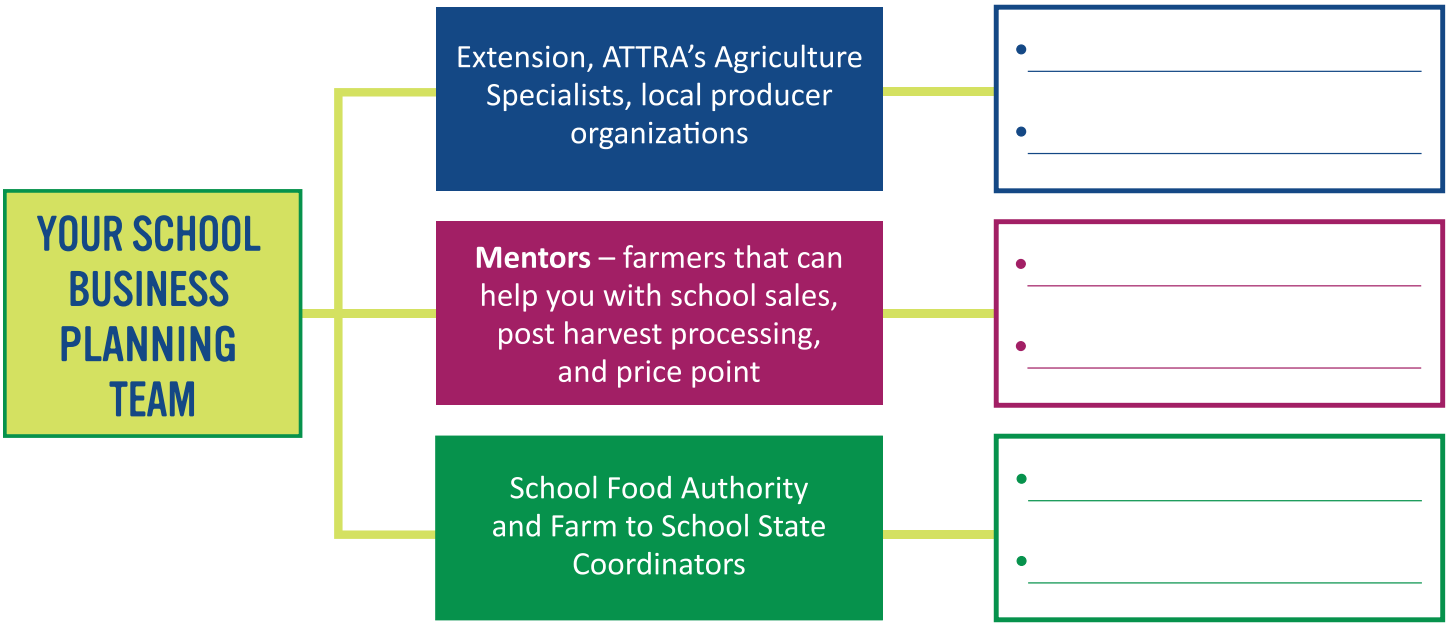
Digging Deeper: At the end of each section, you will find links to tools that can help you get more information on the topics covered in the module. Most of these resources live online and will be included in the online version of the Producer Workbook, along with podcasts and videos of case studies featured in this workbook.

Your School Business Action Plan

This curriculum will walk you through the development of a School Business Action Plan that identifies next steps in selling to schools. As you know, accessing a new market channel requires a business-planning approach. This means thinking through your goals, infrastructure investment, and financial considerations of selling to schools. This training will help you gain knowledge and tools to address challenges within each of these critical areas in accessing school markets. The School Business Action Planning Guide can be completed in groups or on your own. The post-module questions will help you think through and develop short-term goals (or action steps) and provide a road map for success in school sales. Once developed, your School Business Action Plan can be used as an internal business management tool or as a way to communicate your plans to others outside of your business, such as lenders, investors, and customers.

Your School Business Planning Team

Planning to sell to schools can be more successful and fulfilling if it is done as a team. Your planning team can be thought of as folks involved in your business and may include family members, employees, other producers, landlords, customers, input dealers, lenders, community members, and other technical experts. Drawing from the expertise of your team in the planning process will not only enrich brainstorming but will also secure support for your plan from those who are involved in the operation. Use the spaces in the graphic on the next page to identify specific folks to include in your school business planning team.



II. TRAINING MODULES

INTRODUCTION: THE POWER OF FARM TO SCHOOL

INTRODUCTION: THE POWER OF FARM TO SCHOOL

Introduction: The Power of Farm to School Slide Deck

In this section you will:

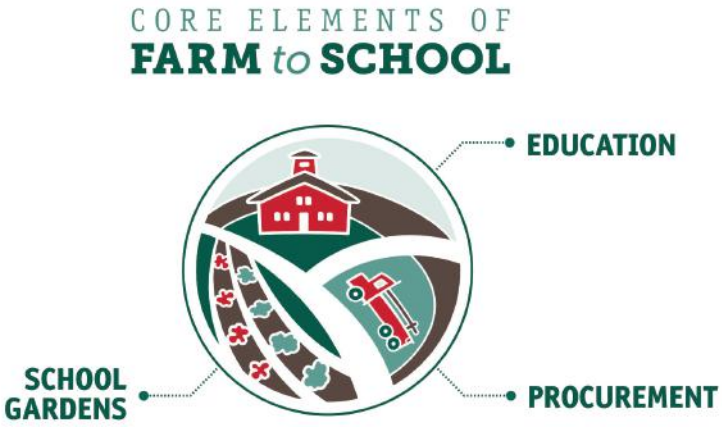
- Understand what farm to school is and how you can benefit from school sales.
- Identify your motivations for selling to schools and how they align with your farm goals.
- Learn about action planning as a tool for meeting farm goals through school sales.

CONTENT	LEARNING MATERIALS
A. What is Farm to School? (page 3) • Three Core Elements • Why Local Food in School Meals? B. How Your Farm Goals Support Farm to School Sales (page 4) • Whole-Farm Planning and School Sales • Business and Skills Assessment for Farm to School C. Action Planning for Success: How Farm to School Can Help You Meet Your Fam Goals (page 5) • Action Planning: Setting Your Goals	Slide Deck *(See handout or online)* Worksheets: • School Business Assessment • School Business Action Planning Guide *(Note: you will be referring to this throughout the entire training)* Case Studies: • Podcast: Producer-Buyer Farm to School Perspectives (Fiery Ginger Farm and Natomas Unified School District)

What is Farm to School?

Farm to school implementation differs by location but is generally understood to include one or more of the following:

- Procurement: local foods are purchased from a farm or food hub, promoted, and served in the cafeteria or as a snack or taste-test
- Education: students participate in education activities related to agriculture, food, health, or nutrition, which may include an in-class or school garden visit from a farmer or a class field trip to a producer's farm or place of business
- School gardens: students engage in hands-on learning through gardening, providing additional opportunities for farmers to engage in mentorship, management of the garden, or on-site education.



The impacts and benefits of farm to school are amplified when all three activities are used in conjunction.

Although people often think there is one standard farm to school program, the reality is much more variable! Farm to school is unique in every community. Farm to school supports local and regional farmers while improving the health of children and communities. Core elements can be used to leverage one another, but this training and its accompanying workbook will primarily focus on the element which is most meaningful to you as a producer: selling your products to nearby schools.

Key Terms

- Whole-farm planning
- School Business Action Planning
- School Business Assessment

School Sales: A New Market for Your Product!

School Food Authorities are interested in purchasing local food products – and there's room to grow![1]

- 42% of districts surveyed by USDA say they participate in farm to school activities
- 5,254 districts; 42,587 schools
- $789 million invested in local communities
- 17,089 salad bars offer healthy options
- 1,039 school districts are serving local foods in summer meals

These numbers demonstrate an opportunity for economic growth and market diversification. According to the National Farm to School Network's Benefits of Farm to School factsheet, there is an average 5% increase in income from farm to school sales.[2] School sales also have the potential to establish a long-term revenue stream for individual producers. And, some producers see that school sales align with their values and goals.

There are other reasons why schools may be interested in serving local food in school meals, including:

- Support for local farmers, businesses, and local economies
- Increase in school meal quality and overall program participation
- Increase in kids' willingness to try new fruits and vegetables
- Alignment with school wellness policies and broader school-board priorities

1 USDA. 2015. Farm to School Census Respondent Data (Updated 10/31/16). https://farmtoschoolcensus.fns.usda.gov
2 National Farm to School Network. 2020. Benefits of Farm to School Fact Sheet. http://www.farmtoschool.org/Resources/BenefitsFactSheet.pdf

How Do School Sales Align with Your Goals?

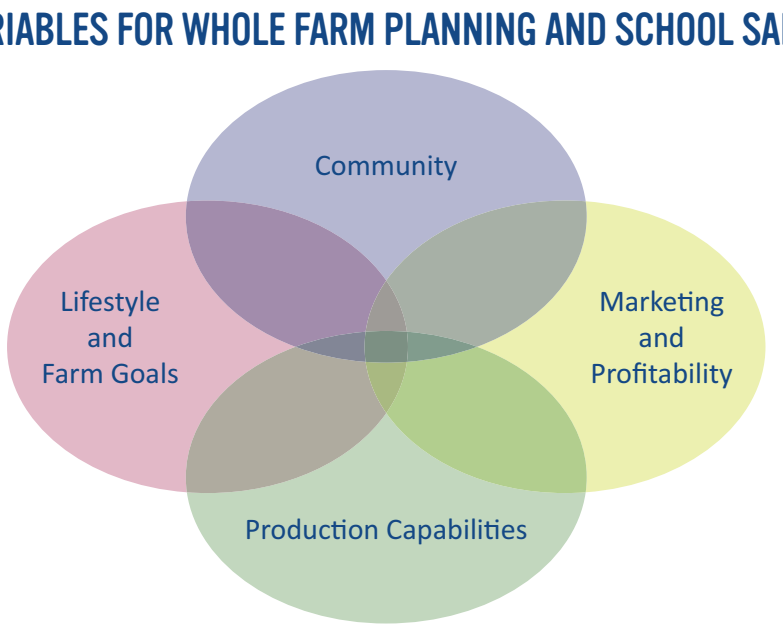
This training encourages you to think about using whole-farm planning and goal setting to determine if school sales work for your farm. Whole-farm planning helps you identify the many connections and interactions within the farm, your family, and your land to develop an integrated approach to decision-making that considers all components of the farm business, including environmental, economic, and social.[3] This approach can help you consider these interconnected components of selling to schools. The illustration below shows how different variables will shape your farm goals as they relate to school sales. These variables include the following:

- Lifestyle and farm goals: How do you feel about risk? What are your lifestyle goals?
- Community: School sales aren't just for your bottom line. What community impacts do school sales have, and do they align with your farm mission statement? Are you growing products that schools want? Do you have access to community resources and capital?
- Marketing and profitability: How far are you from your target market? Are your transportation corridors difficult for accessing school markets? Are you aware of your break-even price for your products?
- Production capabilities: Are you confident in your production capabilities? What investments in food safety or equipment, for example, need to happen for accessing school markets?

Spend some time reflecting on which of these variables relate to your goals and motivations for selling to schools in your School Business Action Planning Guide, starting on page 52 of this workbook.

Whole-Farm Planning and School Sales

Figure 1. Whole-Farm Planning Variables and School Sales[4]



Farm to School Resources and School Business Assessment

It is important to remember that whole-farm planning is a process that includes all components of the farm and requires you to develop action items and timelines based on periodic assessments. Every farm is in a different place with preparedness for engaging in school sales. The School Business Assessment tool in your *School Business Action Planning Guide* (Appendix A) will help you identify areas that will be particularly important to think about and plan for as you move through the training. As shown in Figure 2, each category in the farm to school business assessment tool is arranged by modules and content areas covered in this training.

Use the blank assessment on page 53 to identify gaps in your skills and resources that need to be addressed before starting school sales.

3 Stephenson, Garry. 2019. Whole Farm Management. Center for Small Farms and Community Food Systems. Oregon State University.
4 Ibid.

SCHOOL BUSINESS ASSESSMENT

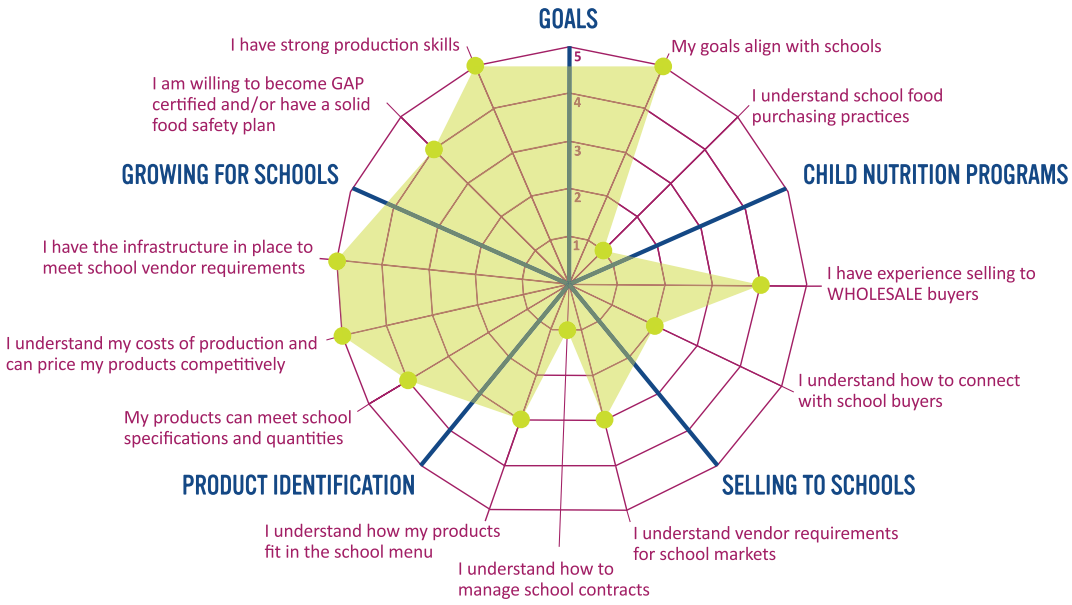


Figure 2. Sample School Business Assessment[5]

Turning Goals into Action through Action Planning

Based on the areas within your skills and resources assessment where you scored low, you can start to identify areas that need more attention and focus on those throughout the training. Use the *School Business Action Planning Guide* (Appendix A, pg. 54) as a tool to outline your short-term SMART goals and help you identify next steps in selling to schools.

As you move through each module, you will be prompted to think about gaps that need to be addressed and the action steps needed to overcome them. At the end of this training, you will have the opportunity to revise and refine your plan, once you have the whole picture of farm to school sales.

What are SMART goals?

SMART Goals = Specific, Measurable, Achievable, Realistic, and Timebound. As you work through your action planning template, make sure your "Next Steps" are SMART!

Digging Deeper: The Power of Farm to School

Bringing the Farm to School Case Studies

- http://www.farmtoschool.org/bringingf2s-casestudies
- Podcast: Producer-Buyer Farm to School Perspectives (Fiery Ginger Farm and Natomas Unified School District)

Whole-Farm Planning Tools

- Virginia Tech Beginning Farmer Program: Whole Farm Planning Curriculum https://www.vabeginningfarmer.alce.vt.edu/planning/WFP-Curriculum.html
- Whole Farm Plan Guide https://www.communityfarms.ca/PDFs&LinkedDocuments/wfp_final_adapted.pdf

5 University of Vermont. Vermont New Farmer Project. https://www.uvm.edu/extension/newfarmerproject

MODULE 1: GETTING TO KNOW SCHOOL MARKETS

Module 1: Getting to Know School Markets Slide Deck

In this section you will:

- See the scope and viability of Child Nutrition Programs (CNPs) as a market opportunity and begin to assess the viability of school markets for your business.
- Understand how CNPs menu, process, and prepare foods, so you can consider how your products meet the needs of school markets.
- Understand the basic regulations governing school food procurement and how they impact CNP practices for sourcing and purchasing local foods.

CONTENT	LEARNING MATERIALS
A. Child Nutrition Programs (page 6) • Introduction • A Brief Overview of Child Nutrition Programs • What Influences School Meal Program Purchasing? • The Diversity of School Meal Programs	Module 1: Getting to Know School Markets Slide Deck Section A *(See handout from your instructor or look online)* • Case Studies — Videos ▫ Farm to School in Action Video ▫ School Kitchen Tour Video • Worksheets/handouts — 1A: Getting to Know Your School Market (page 10)
B. Local Food Sourcing and Procurement in School Meal Programs (page 11) • The Farm to School Supply Chain • School Food Procurement 101 • School Food Procurement 101	• Module 1: Getting to Know School Markets Slide Deck Section B • Worksheets/handouts — 1B: Child Nutrition Program Case Studies (page 14) — Action Planning Worksheet (Appendix A, page 52)
C. Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs (CACFP and SFSP)	• Module 1: Optional Content – Opportunities Beyond the Lunchroom Slide Deck (Slides 1-11)

This section is intended to provide you with a high-level overview of USDA Child Nutrition Programs (CNPs) as a market opportunity and to help you understand the regulations and characteristics of CNPs that influence school district purchasing practices.

Child Nutrition Programs

School meals have changed a lot over the years. New policies have been enacted and implemented in the last 10 years, requiring more—and an increased variety of—fruits and vegetables, more whole grains, lean protein, and low-fat dairy. School meals aim to ensure access to safe and healthy foods. In many programs, there is a focus on tasty, healthy food that children really want to eat and that fuels them for learning.

The school meal program originated not just as a way to provide food for children, but also to create a market for producers with extra product. Many programs and purchasing practices still aim to support and benefit agricultural producers. There are other meals or "nutrition programs" outside of just school lunch. Together, these diverse programs are known as **Child Nutrition Programs (CNPs)** and are funded and administered by the United States Department of Agriculture. **Child Nutrition Program operators** and **school nutrition directors**, the directors and decision-makers who operate Child Nutrition Programs, are focused on quality of foods and connecting kids to healthy, appetizing food. Many of them are interested and passionate about local, high-quality products coming from farmers like you.

CNPs go beyond K-12 school lunches. The many different CNPs have different needs when it comes to food purchasing, which can mean different opportunities for you.

Key Terms from this Module

to help you communicate with buyers:

- Child Nutrition Programs (CNPs)/School Meal Programs
- School Food Authority (SFA)/ School District
- Child Nutrition Program Director/ School Nutrition Director
- Child Nutrition Program Operator/ School Nutrition Staff
- State Administering Agency
- Food Service Management Company (FSMC)
- Food Supply Chain
- Procurement
- Federal Procurement Regulations
- Vendor
- Solicitation
- Contract
- Specification

National School Lunch Program (NSLP)	• Provides lunch for students at K-12 schools (including public and nonprofit private schools and residential child-care institutions). • A wide variety of sizes of programs and ways of purchasing for this program. In a small community, these CNPs may serve only a few students, but, in a large community, CNPs may essentially feed tens of thousands of children each day.
Fresh Fruit and Vegetable Program (FFVP)	• Provides additional fresh fruit and vegetable snacks throughout the school day in eligible elementary schools.
School Breakfast Program (SBP)	• Usually operates in conjunction with NSLP, but ensures students have access to breakfast.
Child and Adult Care Food Program/At Risk After School (CACFP)	• Provides meals and snacks for children in early care and education (preschools, child-care centers, family day-care homes) and after-school programs. • Typically smaller than NSLP and can often function throughout the traditional school year and summer, providing year-round market opportunity.
Summer Food Service Program (SFSP)	• Ensures children have access to healthy meals over summer break. • Programs may take place at a school or in community locations like parks, libraries, or even farmers markets.

All together, these Child Nutrition Programs serve millions of children and purchase billions of dollars of food annually. According to the 2019 USDA Farm to School Census, child nutrition programs spent 1.26 billion dollars on local food in the 2018-19 school year.[6] This may be only part of the picture. Some states provide supplemental funding and even provide additional reimbursement for local foods served.

This training focuses on the programs most often administered through school districts, including the National School Lunch Program, School Breakfast Program, and Fresh Fruit and Vegetable Program. Collectively, these will be called "school meal programs."

Child Nutrition Programs, School Food Authorities, School Nutrition Directors, School Food Buyers. What is the difference?

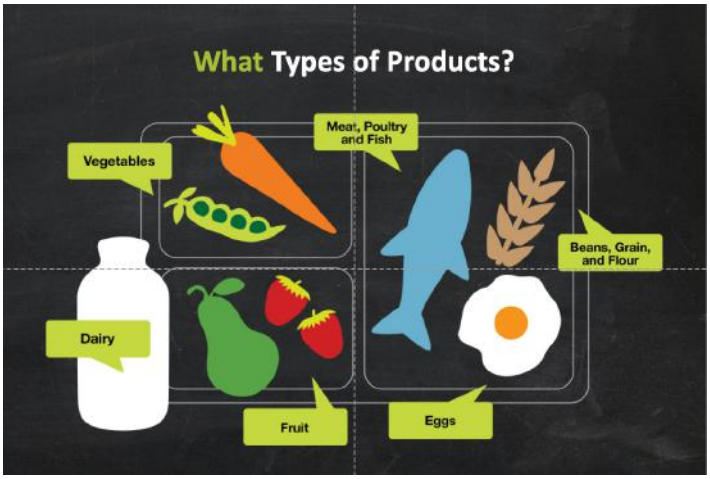
You will read about many ways to refer to school food, and the folks at schools making food purchases, throughout this workbook. For the purposes of this workbook, we have made a conscious decision to simplify this terminology. For example:

- A Child Nutrition Program (CNP) can be more than school lunch. However, we are focusing primarily on Child Nutrition Programs (and the products that go into the meals and snacks that they serve) that take place during the school day and are administered by School Food Authorities (school districts). Therefore, we will be using the terms **school meal program, school meals,** and **school food** (the food served in school meals and snacks).
- A School Food Authority (SFA) is the administering unit for the operation of a student meal program and is most often a **school district**. **School nutrition directors** are the individuals responsible for planning, administering, implementing, monitoring, and evaluating all aspects of school meal programs. We will also refer to them as **school buyers** in some content areas. **School nutrition staff** are the individuals preparing school food and serving school meals at the district or school level.

6 USDA. 2021. Farm to School Census. Food and Nutrition Service. https://farmtoschoolcensus.fns.usda.gov/.

A Look at School Meals

Despite slight differences across the programs, school meals include the same five required food components: milk, grains, protein (meat or meat alternative), fruits, and vegetables. Local foods can span the whole tray.



Any or all of the meal components can be purchased from local farmers or producers. For each of these components, there are some additional nutritional requirements. You can start to think about what you do—or could—produce that meets these school nutrition requirements:

- Milk: fat-free or low fat (1%)
- Grains: Half of grain products served must be "whole-grain rich," meaning greater than 50% whole grain. All other grain products must be enriched. If you are selling a grain product, it is important to communicate that it is greater than 50% whole grain, so programs know it fits their requirements.
- Fruit: limited juice (offer whole fruits instead)
- Vegetables: Weekly vegetable sub-group requirements and food examples include:
  - Dark green: bok choy, spinach, kale, chard, collard greens, broccoli, dark green leafy lettuce
  - Red/orange: winter squash, carrots, red peppers, sweet potatoes, tomatoes
  - Beans and peas: black beans, black-eyed peas, lentils, pinto beans, etc.
  - Starchy: cassava, corn, green peas, plantains, potatoes
  - Other: celery, zucchini, cauliflower, green beans, cucumbers
- Meat/Meat alternatives: meat, poultry, fish, cheese, yogurt, dry beans and peas, whole eggs, alternate protein products, soy yogurt, tofu, peanut butter or other nut or seed butters, and nuts and seeds

Key leverage points to remember when selling to school markets:

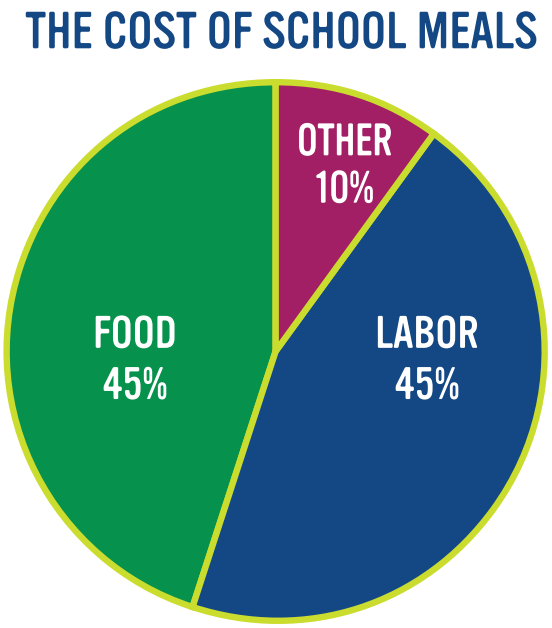
- Color and variety—program operators look for a diversity of vegetables to meet meal pattern requirements.
- Overcoming seasonal barriers—cold-weather crops and storage crops can help meet the vegetable sub-group meal pattern requirements (greens, winter squash, sweet potatoes).
- Meat, dairy items, grains, and more may be available for sale year-round.
- Whole, less-processed foods, like those that you are offering, can help meet nutrition standards that limit sodium, saturated fat, trans fat, and calories.

Cost and Price Point

We know that one of the perceived barriers to selling to school meal programs is finding a price point that buyers can afford and ensuring that this price point benefits you as a producer. According to the School Nutrition and Meal Costs Study released in 2019[7]:

- The average cost to produce a school lunch is $3.81.
- The average cost to produce a school breakfast is $2.72.
- The breakdown of that cost is: 45% for food, 45% for labor, and the remaining 10% for all other costs (supplies, contract services, etc.)
- That equals $1.71 spent on food for a school lunch and $1.22 spent on food for a school breakfast.

These are small numbers, but they can add up. With 28.9 million meals served each day, at $1.71 spent on food, that is $49.4 million dollars each day.



Child Nutrition Program operators and school nutrition directors have to be creative with how they purchase foods. Yet many school meal programs are serving delicious meals full of local foods on this budget. School meal programs have flexibility in how they spend their food dollars, so they may go over this budget for some items or a special meal and balance that by using more USDA Foods or less-expensive foods in other meals.

Product Needs and Size of the District

In the chart below, you can see how the type and size of a school meal program determine the amount of product they require. When exploring potential school meal program markets, it is important to know these factors and what volume the program needs. These factors include:

- Size of school and average number of meals served
- Type of school meal program (e.g., National School Lunch Program versus Fresh Fruit and Vegetable Program)
- Mode of serving (plated meals versus salad bar)

Product Need: One Size Does Not Fit All – Pounds of Broccoli Needed for Various School Sizes and Serving Models

CNP SETTING	SERVING SIZE	NUMBER OF MEALS	POUNDS NEEDED
Large K-12 District - Plated Lunch	3/4 Cup	350,000	108,150
Medium K-12 District - Plated Lunch	3/4 Cup	5,000	1,545
Small K-12 District - Fresh Fruit and Vegetable Snack	1/2 Cup	500	102
Medium K-12 District - Salad Bar	Variable	Variable	50

School Food Production and How It Affects Purchasing

Just like your farm is different than your neighbor's down the road, every school meal program is different. They have different production models based on their size, scale, equipment, and infrastructure. The program model will influence who you need to connect with to get your product into the system:

- On-site food preparation— Meals are prepared on-site at the school. This model may be operated by the school district or a food service management company may be contracted by the school district to operate any aspect of the food service program.
- Central kitchen model—One large central kitchen (or satellite production kitchen) prepares food and delivers the prepared meals to "satellite" or school site locations. This model may be operated by a school district, or contracted to a food service management company.
- Vended meal sponsors—A third-party meal supplier is contracted by the school district to prepare and deliver meals.

7 USDA. 2019. School Nutrition and Meal Cost Study. https://www.fns.usda.gov/school-nutrition-and-meal-cost-study.

AGRICULTURAL PRODUCERS' TOOLKIT

Bringing the Farm to School

— Producer Worksheets —

Worksheet 1A: Getting to Know Your Local School Market

Worksheet Objective: Use the USDA Farm to School Census data to identify current local-food-purchasing practices in schools and districts/school food authorities in your region and state.

Resources: https://farmtoschoolcensus.fns.usda.gov

Directions:

- Use your phone or mobile device to access the USDA Farm to School Census Website (https://farmtoschoolcensus.fns.usda.gov).
- From the menu, select "Census Results" and select your state or local school food authority (also known as your school district).
- Additional information on each state and each school food authority can be found through the following steps:
  - Navigate from the homepage to "About the Data"
  - Scroll to the bottom of the page to find hyperlinks for "2019 Farm to School Census data for each SFA" and "2019 Farm to School Census State Summary"
- Use the information to answer the following questions.

School Food Authority(SFA)/School District Name: _____

What size is your local school district?	
From where does the SFA purchase local foods?	
What are the top five local items purchased by your local SFA?	
For the 2018-2019 school year, about how much of your SFA's total food purchases were spent on LOCAL foods INCLUDING fluid milk?	
How many schools in the district have salad bars that served local foods?	
What percent of food is from scratch?	

State (explore the 2019 Farm to School Census State Summary): _____

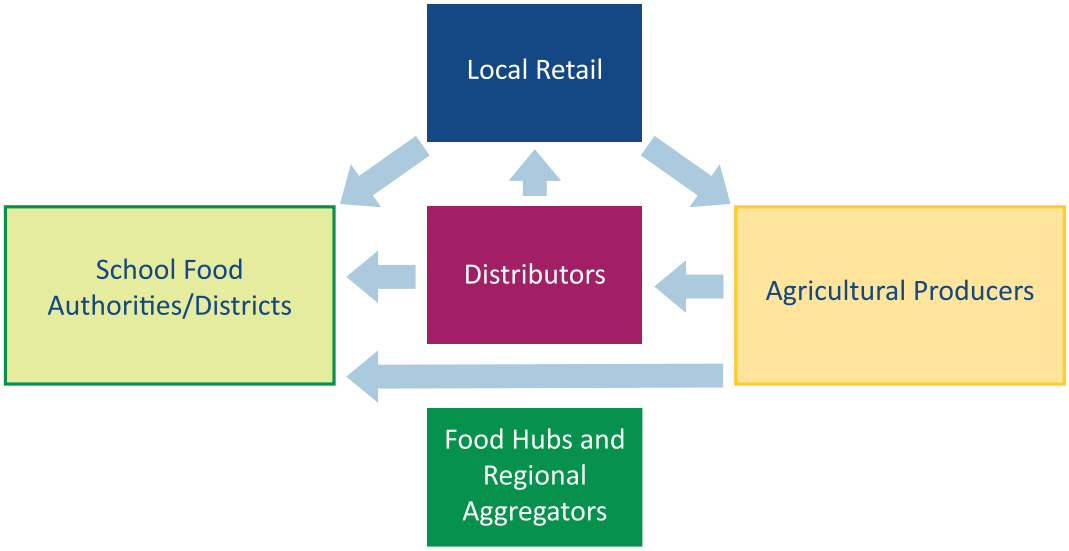
What percent of schools in the state serve local food (Tab 14)?	
What are the most frequently purchased types of foods (Tab 25)?	
What percent of its budget is the average district spending on local (Tab 27)?	

Local Food Sourcing and Procurement in School Meal Programs

What does local mean to a school district?

The definition of "local" is flexible. Local food is typically defined by the school district, but it may be defined by the state for a particular program. As a producer selling local food to schools, it is important to know that "local" can vary based on product and time of year, or it could even be a "tiered" definition. Defining local allows school districts the ability to track purchasing and create benchmarks and can allow schools to use geographic preference for purchasing. Local also spans the whole plate and includes all meal components!

THE FARM TO SCHOOL SUPPLY CHAIN



School districts source local foods through a variety of sources. You can find more in-depth information on the various market channels for local food in Module 2.

- Direct from producers
- Distributors
- Food service management companies
- Local retailers
- Processors
- Food hubs and aggregators
- Gardens
- USDA Foods

Schools incorporate local foods in a variety of ways. Think about starting small and building into larger quantities as you build trust and reliability.

- Meals – Including breakfast, lunch, and dinner
  — Also condiments, entrée ingredients, spices, salad bars
- Harvest of the Month and State plates (or other state-endorsed campaigns)
- Snacks (including the Fresh Fruit and Vegetable Program)
- Taste tests and educational activities
- Special events, such as community meals and fundraisers

Schools may not start right away with large amounts of local product in meals. They may prefer to start with a one-time event or tasting. These opportunities can provide a pathway for developing a relationship with School Food Administrators and lead to future purchases.

Bringing the Farm to School Case Studies

Local Food and School Meal Programs in Action

These brief case studies will help you understand the different needs of school meal programs and help you start to think about the right size and type of school meal program that would make sense for your business. You can read the extended case studies and hear podcasts from these producers and their school meal program partners on the Bringing the Farm to School Case Studies page.

Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity

Joseph Martinez, Arizona Microgreens, Phoenix, Arizona

Joseph Martinez and his brother David founded Arizona Microgreens seven years ago in Phoenix, Arizona. Operating out of a medium-sized greenhouse in the heart of the city, they produce organically-grown microgreens – like micro salad mixes, micro kale, and pea shoots – for restaurants, farmers markets, schools, and hospitals throughout Arizona. Arizona Microgreens sells their product to school districts for use in the Fresh Fruit and Vegetable Program (FFVP), which is administered by the United States Department of Agriculture. In addition to providing free fresh fruit and vegetable snacks to children, the program aims to introduce children to new and different fresh fruit and vegetable varieties and educate children about the foods they eat. Arizona Microgreens finds the FFVP program a great fit for their product because microgreens are unique and new to many students and Joseph is able to offer an educational video for teachers to share with their students that shows how the microgreens grow. He spent time researching which school districts participated in the FFVP (most state departments of education can provide this information), and how many FFVP sites each school districts had. Focusing on districts with only a handful of participating FFVP sites was a good early fit for Arizona Microgreens, so they didn't have to worry about fulfilling a demand above their production capacity. One challenge in selling to schools for FFVP is that many schools are looking for individually packed items. Joseph provides clear communication with schools about the pack size he is able to offer and how it can be broken down in the classroom for individual servings. For other growers looking to sell to schools for FFVP, Joseph recommends asking schools what they're looking for and offering how you can help. "Schools that participate in the FFVP have money to spend. Ask what problems they're running up against and how you can help," offers Joseph. "Is it price point? Looking for new, unique products? Shelf-life? Education component?" As Joseph's story shows, schools are able and willing to adapt when they see a clear value-add. Focusing on how your product can meet their need is a good place to start. https://www.fns.usda.gov/ffvp/ffvp-fact-sheet

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Building Sustainable Relationships with School Nutrition Programs

Rae Rusnak, L&R Poultry and Produce, Goodhue County, Minnesota

Rae Rusnak owns L&R Poultry and Produce, a 72-acre farm in Goodhue County, Minnesota, where she grows organic vegetables and maintains a flock of 300 chickens for free range eggs. She began her farm in 2003 and made her first school sale in 2010. Today, her largest school market is Minneapolis Public Schools (MPS). As the second-largest school district in Minnesota, MPS serves more than 35,000 students across 63 school sites. Kate Seybold is the district's Farm to School Coordinator and works directly with farmers like Rae to purchase local food for the district's food service program. For Rae, the status and magnitude of MPS's food service program made for an exciting opportunity. In addition to providing a large-scale market for her products, MPS also offered Rae training and support to become more knowledgeable about selling to institutions. "There are a few more steps involved than just selling to the local co-op, and it takes some getting used to," said Rae. Over the years, Rae and Kate have worked closely to hone in on what products work best for Rae's farm and MPS's school meal menus. The answers to these questions for Rae and MPS have been winter squash (butternut and spaghetti squash), summer squash (zucchini and yellow squash), and root vegetables (rutabaga and kohlrabi). Narrowing in on these items has allowed Rae to

— Continued on next page —

become more mechanized and efficient in her growing. “I was looking to grow fewer vegetables, but at larger quantities. These vegetables were a good fit for that,” she said. Knowing these vegetables are consistently a good fit for MPS has also allowed Rae to get more specialized in the varieties she’s growing. Unlike co-ops and direct-to-consumer markets, school districts can handle large-sized produce which can have high processing yield and less waste. MPS uses a local food processor to wash, chop, package, and deliver local produce from farmers like Rae to individual school kitchens. This third-party company is an important one to highlight in Rae and MPS’s relationship. While MPS facilitates an annual Request for Proposals (RFP) and works directly with farmers to plan and order produce for the year, the local food processor is the one to send purchase orders to farmers, where the farmers deliver their products and get paid, and the company from which MPS buys finished, local produce for its school meals. For Rae, farm to school had been a “tremendous business opportunity.” Through her steady and long-term relationship with MPS, she’s been able to scale up her business, become more mechanized, and increase her farm’s productivity. MPS’s large purchases have also allowed her to save time and fuel in deliveries, compared to when she made smaller sales to co-ops, and have also made it easier to have additional employees since she knows what the season’s work will be and what makes sense to invest in labor costs.

The Right Products and the Right Partnership

Kenneth Sweat, Sweat’s Produce, Wrightsville, GA

Kenneth Sweat owns Sweat’s Produce, a 100-acre farm in Wrightsville, Georgia, where he has grown peas, butter beans, and other vegetable crops for over 40 years. In addition to managing his farm, Kenneth operates a farm store where he sells many of his products. He also makes sales to local schools, such as Burke County Public Schools (BCPS), which serves approximately 4,300 students across five school sites. Burke County is located in a rural part of Georgia, and with just two grocery stores in the entire county, fresh food access can be a challenge for many families. Providing students with healthy, local foods in school meals is a key motivator for Donna Martin, the district’s Director of School Nutrition Programs. She started the district’s farm to school program eight years ago and was the first one to reach out to Kenneth about selling his peas and butter beans for students to eat in school meals. “Kenneth will tell you that I wore him down to grow for us,” said Donna. “But I also like to remind him, we’re the gate that opened the gate, that opened the next gate…!” Currently, between 25-40% of Kenneth’s total produce sales are made to school markets. In total, he estimates selling between six and seven thousand bushels of peas and butter beans to schools every year. Selling to schools has several advantages that make for a good fit in Kenneth’s business. Security in being paid for his products on-time is one of the top advantages. “You’re not worried about getting your money,” said Kenneth. “It may take 30 days, but they’re good people to do business with.” Donna adds, “When we award a bid – for whatever the product is – the farmers know they have a guaranteed buy from us.” BCPS’s annual bidding process – done during the winter months to plan for the next school year – also helps Kenneth know what crops he needs to plant, how much of each, and at what times in order to meet BCPS and other schools’ needs throughout the year. Kenneth’s peas and butter beans have been an especially good fit for BCPS and other school districts because they are easy to cook with and can taste delicious both fresh and frozen. To take advantage of this, Kenneth has been committed to developing a process for freezing his produce in a way that preserves peak quality and can be easily stored for year-round use. Unlike some other farm to school programs across the country, Kenneth and BCPS do not use a third-party local produce processor or distributor. Kenneth’s business model and BCPS’s school kitchen setups allow Kenneth to directly deliver his farm products to BCPS schools, each of which have their own kitchens. Kenneth and Donna’s partnership in providing the students of BCPS with high-quality, local produce in school meals is a strong example of how the right products and the right farm to school opportunity can benefit farmers, schools, children, and communities. “There’s a lot more demand than I can handle," said Kenneth, who after 40 years of farming is content with his sales. Many schools continue to be eager to have farm to school partnerships like Kenneth and Donna’s, and the time is right for more farmers and producers to seek out these partnership opportunities.

Worksheet 1B: School Meal Program Case Studies – Finding the School Meal Program for You

Worksheet Objective: Begin to identify which type and size of school meal program might be the right outlet for you by reviewing case studies highlighting how different school meal programs purchase and use local products.

Resources: School Meal Program Case Studies

Directions:

- Review the assigned school meal program mini case study.
- Respond to the questions below and discuss at your table and with the group.

School Nutrition Program Featured in Case Study: _____

1. What makes the school meal program and school district in the case study a good fit for the producer in the case study? (Consider size, scale of production, kitchen capacity, etc.)

2. Based on what you read in the case study, would you consider selling to this type and size of school meal program? Why or why not?

3. Do you have experience selling to school districts for school nutrition programs? What have been the benefits or challenges for you?

4. What are the key factors you saw in the case study that made the producer a good fit for the school meal program type and size?

Procurement: What you need to know

It is important to understand how schools procure food and why the system is set up as it is. This can help you understand and communicate effectively with the school district. The primary reason for these principles (and other procurement regulations that are in place) is to ensure tax dollars are spent competitively, efficiently, and effectively.

School districts utilize a variety of procurement methods. The type of method applied is dependent on the dollar value of the purchase. Although these may seem complicated, the procurement processes are important to ensure that taxpayer dollars are used appropriately.

Procurement Methods (Title 2 Code of Federal Regulations Section 200.320)[8] :

- Informal Procurement
  - Micro purchase
    - Federal threshold of $10,000.*
    - It is non-competitive (solicitation not required) but must not limit competition.
    - It must be equitably distributed across qualified suppliers.
    - This could be a one-time order from a SFA or a purchase agreement for four orders under $10,000 (or the state/local threshold).
  - Small purchase
    - Federal threshold of up to $250,000.*
    - These purchases require price/rate quotes and specifications of a product. The buyer is required to document the competitive process.
    - This might be an over-the-phone or an email request for a price quote or a more formal request for quotes (RFQ).
- Formal Procurement – The SFA develops and publishes an Invitation for Bid (IFB) to award a fixed-price contract. They can also develop and publish a Request for Proposals (RFP) to award either a fixed-price or cost-reimbursable contract.

**Important Note: State or local thresholds may be lower. When present, the most restrictive threshold applies.*

Procurement Process

Though procurement methods can vary greatly in application, the procurement process remains largely the same, regardless of the size and scale of the purchase (with some slight variations). See the graphic below which demonstrates the steps of the procurement process. In Module 2, you'll learn more about the producer's role throughout the procurement process.

Questions for Reflection — Where Are You Now?

Reflecting on what you have learned in Module 1, how does your current production and infrastructure align with school market needs?

- Type and variety:
  - What products am I already growing that would be of interest to School Food Authorities?
- Size and scale:
  - Based on the descriptions in this section, what (general) size of program do I have the capacity to grow for (small, medium, large)?
- Level of processing:
  - Can I offer fresh, whole, unprocessed product and/ or minimally processed product?
- Market channels:
  - What relevant market channels am I already selling through (direct, food hubs, distributors, etc.)?
- Food safety:
  - What are my existing food safety protocols or documentation?

The content in the following modules will help you dive deeper into these questions and consider how to build on your current production, infrastructure, and market channels.

8 United States Office of Management and Budget. 2013. "Methods of procurement to be followed." Code of Federal Regulations, Government Printing Office. https://www.ecfr.gov/cgi-bin/text-idx?node=2:1.1.2.2.1.4.31&rgn=div7

Digging Deeper: Getting to Know School Markets

Full Written Case Studies:

- Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)
- Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&R Poultry and Produce)
- The Right Product and The Right Partnership (Kenneth Sweat, Sweat's Produce)

Podcasts:

- Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)
- Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&R Poultry and Produce)

Videos:

- Regenerating Paradise, Hawaii Center for Food Safety (Dash and Erika Kuhr, HIP Agriculture) https://www.youtube.com/watch?v=9Yc7sNb-6qo
- Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems (Mary Brower, Blue Stem Farm) https://www.youtube.com/watch?v=kU7llclJ1RU
- Farm to School in the Garden State (Northeast Organic Farming Association of New Jersey) https://www.youtube.com/watch?v=s0_380B8fio
- Collards in the Cafeteria (Gaston County, North Carolina) https://www.youtube.com/watch?v=CVaqieqMdec

Resources:

- USDA Memo: Procuring Local Meat, Poultry, Game, and Eggs for Child Nutrition Programs, SP 01-2016, CACFP 01-2016, SFSP 01-2016, United States Department of Agriculture. 2016. https://fns-prod.azureedge.net/sites/default/files/cn/SP01_CACFP 01_SFSP01-2016os.pdf
- USDA Farm to School Fact Sheets, United States Department of Agriculture, Food and Nutrition Service. 2019. https://www.fns.usda.gov/cfs/fact-sheets
- Procuring Alabama Fruits and Vegetables – Procurement Templates, Alabama Department of Agriculture and Industries. http://agi.alabama.gov/fts/ALProcurementHandbook

MODULE 2: SELLING TO SCHOOL MARKETS

MODULE 2: SELLING TO SCHOOL MARKETS

Module 2: Selling to School Markets Slide Deck

In this section you will:

- Identify the best market channels for selling to schools, based on your operation's capacity and goals.
- Understand how to read and respond to a solicitation.
- Understand how to meet the vendor requirements of school markets.
- Understand how to meet the product-quality standards of school markets.
- Understand how to approach and communicate with school buyers.

CONTENT	LEARNING MATERIALS
A. Farm to School Market Channels • Introduction — Overview of Farm to School Market Channels — How Does Your Product Get to the School? • Intermediated Market Channels — Local Retail Outlets — Food Hubs — Regional Distributors — National Wholesale Distributors • Direct-to-School Market Channels — School Buyers — Collective Purchasing Models • Benefits & Drawbacks	Module 2: Selling to School Markets Slide Deck *(See handout from your instructor or look online)* • Case Studies — Food Hub ▫ **Video**: Farm to Food Hub to School Part 1 and Part 2 (online) ▫ **Written Case Study**: Farm to Food Hub to School (Alex McCullough and McKenna Hayes, Food Connects) ▫ **Podcast**: Farm to School to Farm Again (Alicia Ellingsworth, Kansas City Food Hub and Kansas City Farm School) ▫ **Video**: Michigan Farm to Freezer — Distributors ▫ **Written Case Study** and **Podcast**: Local Produce through DoD Fresh in Montana (Grasmick Produce; Montana) ▫ **Video**: Growing Farm to School: Partnering with A Distributor (Amazing Grace Family Farm) — Direct to School ▫ **Written Case Study** and **Podcast**: Leveraging Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm) • Worksheet: — **Worksheet 2A** (page 24): Evaluating Market Channels
B. Selling to School Districts • Selling to School Districts — Understanding School Solicitations — Finding School Solicitations — Exploring Product Specifications — Common Vendor Requirements — Responding to school solicitations — Connecting with School Buyers — Approaching School Nutrition Directors • Conclusion and Next Steps — Action Planning: End-of-Module Check In	Module 2: Selling to School Markets Slide Deck *(See handout from your instructor or look online)* • Worksheets/handouts — Appendix C: Sample Product Specifications Packet ▫ **Worksheet 2B:** School Market Readiness Evaluation (page 106) ▫ **Worksheet 2C:** Responding to School Solicitations (page 110) ▫ **Worksheet 2D:** School Nutrition Director Meeting Checklist (page 112)

Producers sell to schools for different reasons, but, ultimately, producers want to know how to make the sale. By the end of this module, you should have the information needed to assess your operational capacity to meet the standards for various market channels.

Key Terms from this Module *to help you communicate with buyers:*

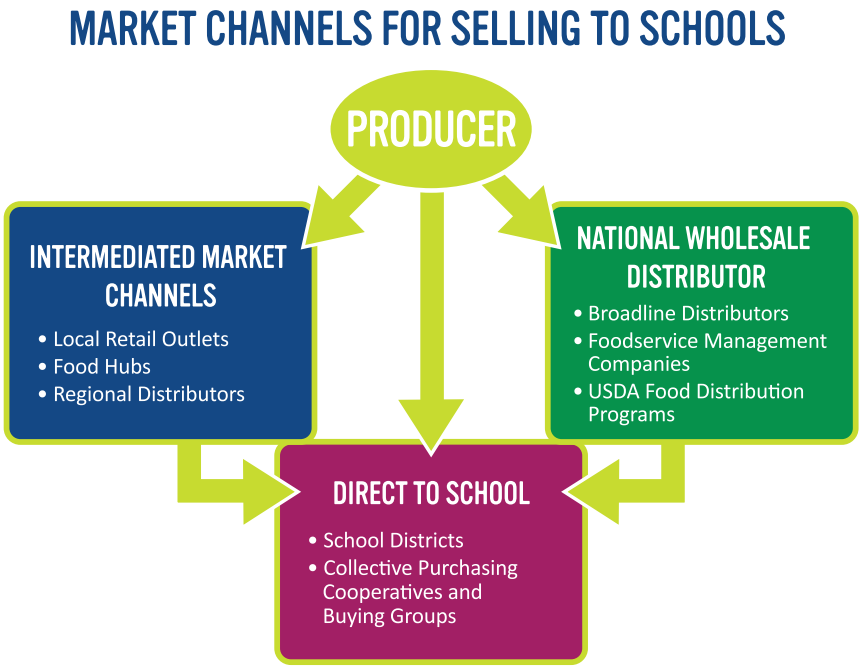
- Market Channel
- Intermediated Market Channel
- Regional Distributor
- National Wholesale Distributor
- Broadline Distributor
- Food Hub
- Food Broker
- School Food Authority
- School Nutrition Director
- Collective Purchasing
- PACA Licensing
- GAP
- Food Safety Plan
- Product Specification
- Post-Harvest Handling Practices
- Values-Based Supply Chain

Farm to School Market Channels

Note: There are a lot of resources on selling to intermediate and national wholesale distribution channels, so this workbook will focus on selling directly to schools.

There are three primary supply-chain models, or marketing channels, for getting your food into school markets. These are defined below:

- Intermediated Markets: Local producers sell to an intermediate distribution partner (or middle person), who then markets their products directly to school districts, coordinates logistics, and ultimately completes the sale. *These channels often will also aggregate and process products. In other words,* ***the producer and school are only separated by one to two steps in the supply chain.*** Intermediated Markets are often values-based supply chains that maintain the identity of the farmers and ranchers who grow or raise a product, and that preserve the social, environmental, and community values that are incorporated into production. Intermediated markets can be an ideal entry point for producers who want to start engaging in school sales; however, for the purposes of this workbook, we will be focusing primarily on direct-to-school sales. Examples of intermediated market channels that sell to schools include:
  - — Food hubs
  - — Regional and local distributors
  - — Retail stores and co-ops



- National Wholesale Distributors: These differ from an intermediate market channel in that they sell your products to an additional distribution partner (often a broadline distributor), who then markets to School Food Authorities and distributes the products to the school district or individual school site (depending on the school foodservice model). *In other words,* ***the producer and school are separated by at least two steps or actors in the supply chain.*** They can also aggregate, process, and/or manufacture products. But, because the chain is national instead of regional, quantity requirements are quite a bit larger, and product specifications are more rigorous. Examples of National Wholesale Distributors include:
  - — Broadline distributors
  - — Foodservice management companies
  - — USDA food distribution programs

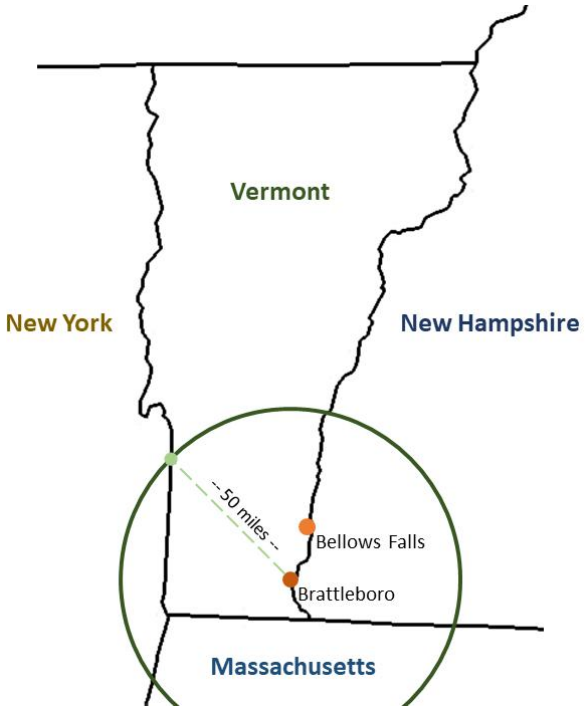
- **Direct-to-School Supply Chains**: Direct-to-school supply chains are what many people think of first when they hear farm to school: a relationship directly between a local producer and the school. This means that, when selling to schools, producers market their products directly to school districts (or as we refer to them here, School Food Authorities). They also coordinate logistics such as distribution/delivery. Examples of Direct-to-School options include:
  - — School districts
  - — Collective purchasing cooperatives and buying groups
  - — USDA Food Entitlement Programs

Worksheet 2A (page 24) will have you dig into evaluating individualized options within these channels, so that you can determine the best approach for getting your product into schools—which may include a mix!

Tips for Working with a Food Hub

Farm to Food Hub to Schools: *Food Connects; Brattleboro, VT*

Food Connects is a nonprofit in Brattleboro, Vermont – the southeast corner of the state, just a stone's throw from the New Hampshire and Massachusetts borders. They run a vibrant farm to school program in line with a rapidly growing food hub that sources from about 120 farms and food businesses.



Based on their work with more than a hundred farmers, the Food Connects' Farm to School Team offered the following advice to farmers looking to sell through food hubs and to schools:

- **Work with a food hub or distributor.** Unless the schools you could sell to have an unconventional program, it can be very difficult to establish a relationship. A food hub can be a great way to work within pre-existing markets.
- **Start small.** Identify just a couple products that you grow: things you specialize in and can grow at a large enough volume to get profits while still selling at larger scales.
- **Think creatively.** Many schools want reasonably priced local products, but are going to be thinking about products that have been processed: cut apples, peeled and cut squash, diced potatoes, etc. Are there community partners you can work with? Don't try to do it alone.
- **Network.** Go to conferences and meetings and learn more about what kind of products are needed in schools and could pay off for your farm.
- **Be patient.** No matter how well prepared you are, getting into school accounts can still take a long time. Larger schools and companies may have bidding processes that take months, if not years.
- **Be open to production planning and forward contracting.**
- **Recognize that every school is different.** Not every school has the same level of readiness when buying from local providers. Look for schools that have their values clearly stated or have an individual who is championing local food.
- **Realize that even a small win is still a win!** Even if a school can only shift its yoghurt order, or only its lettuce order, that opens a door to future conversations. Small wins build on each other to make change.
- **Accept that some products just don't work.** They might be too esoteric or have too complicated a production process to be profitable at an institutional scale. Know when to stop following a lead and move on to a different product.

Direct-to-School Market Channels: From Field to School

Direct-to-school approaches vary greatly, depending upon the size and scale of both the producer and the school district they are seeking to sell to. It is important to consider both the benefits and drawbacks of selling directly to schools.

BENEFITS	DRAWBACKS
• The shortened supply chain helps ensure product can be very fresh and maintain your quality standards. • Cafeteria-based education programs are great opportunities to promote your farm and expand business. • Flexibility in product specifications and standards is greater, compared to other wholesale markets. • Opportunities exist to determine areas of flexibility and potential negotiation. • The procurement process supports relationship-building, which increases the likelihood of continued sales. • There is opportunity to differentiate your value through farm visits and farmer-in-the-classroom programs. • School food policies are largely defined at the local level.	• Establishing and managing relationships with school nutrition directors takes time! • It can be challenging to make your product price-competitive while maintaining profitability. • Infrastructure improvements may be necessary to align with required food safety standards. • Quality management and traceability systems are required to reduce liability in the case of a food-borne illness/outbreak. • Schools are accustomed to certain delivery and drop-off services from vendors. • Payment upon delivery is unlikely and potential lag time may put strain on your operational capacity. • Solicitation methods can be complex and procurement processes tough to navigate.

Selling to School Districts

Next, we want to focus on ways to help make school sales work for you. In this section, you will learn about responding to school solicitations, meeting school market standards, common vendor requirements, and approaching and establishing effective working relationships with school buyers (like School Nutrition Directors). Keep in mind that you will usually need to first find and respond to a school solicitation. That is where the marketing relationship begins.

School Solicitations

"What's in a school solicitation?"

Solicitations are how school districts communicate what they need to purchase. This includes what products they're looking for, when they need them, how much they need, and any requirements they have for potential vendors. Whether they're a conversation or a written document, solicitations typically contain the following information:

- Background Information: goals and motivations
- Description of Goods and Services: needs and *product specifications*
- Procurement Method: how the purchase will be completed
- Technical Requirements: potential *vendor requirements*
- Timeline: duration of the purchasing agreement (time-limited, with a closing date, or ongoing)
- Terms and Conditions of the Contract: states timeline and procedural requirements, (i.e., defines responsive and responsible)

There are many types of solicitations used by school districts seeking to purchase local products. These vary from *informal solicitations* (such as Request for Information and Request for Quotes) to *formal solicitations* (such as Requests for Proposals or Invitations for Bid). Schools use a variety of methods to communicate these solicitations:

- In-person conversations: these can occur through organized buyer meetings, farm to school events, or even interactions from direct-market channels, such as farmers markets
- Emails or phone calls initiated by school buyers: these can be a result of your marketing and promotion efforts, inclusion of your farm in state databases, recommendations from state agency representatives, references from past school customers, etc.
- Developing and posting formal request for proposal or invitations for bids: school districts are required to post their solicitations publicly if seeking formal contracting relationships.

Leveraging Partnerships to Access School Markets, Part I

Alma Maquitico is a farmer and the director at the Anthony Youth Farm located in Anthony, New Mexico, a small community right on the New Mexico-Texas border. Anthony Youth Farm provides farming and training opportunities for low-income and rural youth in southern New Mexico while growing and selling organic veggies to school districts across the state through a **purchasing cooperative.** Alma describes the goal and vision for the farm as "creating economic opportunity for rural youth and families through sustainable food and farming."

During the 2018-2019 school year, New Mexico's Public Education Department (NMPED) piloted a purchasing cooperative of 10 school districts to streamline procurement and vendor requirements and support small growers of color build the necessary capacity to sell to schools. The bid received 20 vendor responses from state-based distributors, food hubs, farmer cooperatives and individual small-scale farmers interested in selling to schools – including Alma and the Anthony Youth Farm. The bid was set up as a yearly contract between the 20 vendors and 10 school districts with the option to renew annually for up to four years.

The purchasing cooperative model has been very successful in building capacity for small farmers, as well as fostering relationships with state procurement offices. It's allowed farmers like Alma to sell to districts she would not ordinarily be able to serve, due to smaller produce volume or administrative burden. It's also directly supported her interest in farm to school as a strategy for strengthening resiliency in her community. "Farm to school is not only about food but about economic opportunity and leadership. It opened up a space for a new generation of farmers and thinkers, thinking about resilience, food justice and social values for a community."

To read the full case study or listen to our conversation with Alma Maquitico, visit this page:
http://www.farmtoschool.org/bringingf2s-casestudies

Product Standards and Specifications

If you have sold to a distributor, you understand that they have a set of requirements, or *specifications.* This is the same with schools. The specifications will be outlined in the solicitation and include:

- Product and variety. *Example: heirloom/variety typical to the region*
- Quality standards and size. *Example: minimally processed foods and seconds* (Ideally, they'll share what they're using the product for in the solicitation)
- Quantity and pack size. *Examples: wholesale pack sizes, sales by unit*

As you probably know, specifications are based on industry standards. School buyers may be accustomed to receiving Grade A products and wholesale pack size from distributors. However, that does not mean that these standards are necessary for their operation. There is flexibility! In fact, your ability to deviate from standards might make your products more attractive to school buyers.

Meeting School Vendor Requirements

In addition to the specifications outlined in a solicitation, schools will also have specific vendor requirements. Some of the requirements are mandatory, while others are determined by the CNP (for example, food safety requirements or delivery requirements). Here are some typical vendor requirements:

- Post-Harvest Handling Practices: harvest and wash station procedures, product traceability and labeling information, and packing requirements (including details like new boxes or reusable crates)
- Food Safety Practices: third-party certification programs (like GAP/GHP), required infrastructure (like wash stations and cold storage), and food safety plans (including documentation of practices)
- Insurance and Licenses: product liability insurance, auto insurance (in the case of delivery), business licenses, and PACA licenses (for regional school markets)

- Payment Systems: invoicing requirements, payment schedules and lag times (often no payment upon delivery), and registration in required vendor systems
- Distribution Logistics: delivery locations, schedules, and equipment requirements (e.g., for accessing loading bays)

Approaching and Communicating with School Nutrition Directors

Do not assume that all schools will have the same motivations and requirements! Knowing the current landscape of the school meal program you want to work with will help you decide how best to approach the school foodservice director, avoid common pitfalls, and ultimately make the sale. You should make an opportunity to meet and take the opportunity to learn about their specific needs and requirements. ***Use the School Solicitation Packet and worksheets in Appendix C*** *(page 65)* ***to set you up for success!***

As with any other market channel, having an understanding of the best time to approach and work with School Nutrition Directors will set you up for success.

- School purchasing cycles vary. Formal solicitations (RFP/IFB) have a set time frame. Small purchases are sometimes informal, and can be year-round. Micro-purchases are immediate and typically short-term.
- Most schools do menu planning in January and February in order to issue solicitations in February and March for the coming school year. Menus are usually cyclical: a recipe or product will be on a rotation (once a month, once every two weeks, quarterly, etc). Note that the cycle menu is often primarily for entrees, and sides and salad bar items tend to rotate more frequently or can be easily substituted.
- Use summer months to connect with schools or find out the best time for the school district and begin relationship development.
- Consider ways to distinguish yourself as a local vendor and add value to your sales relationship.

Distinguishing Yourself in the School Marketplace

All of these activities are great examples of important offerings that add value to your products and differentiates you as a local vendor:

- Field trips
- Classroom visits
- Harvest of the Month programs
- Cafeteria-based promotion and tastings
- Special events
- Garden clubs

Important Tips for Working with Schools to Make the Sale

It is important to be patient when approaching school buyers. Working directly with farmers may be as new to them as working with schools is to you. Here are a few things you can do to help jump-start relationship-building and build trust:

- Avoid judgement and don't shame school food. Remember, school nutrition staff are doing this work for many of the same reasons you farm: to feed hungry kids and support the community.
- Be prepared. Prepare an overview of your practices and a list of questions to cover to help ensure that the meeting is productive and benefits both of you. (See "School Nutrition Director Meeting Checklist" on page 112 in Appendix C). Take time to learn about school nutrition by practicing some basic school-food vocabulary and reviewing menus. Consider bringing along some products to sample or marketing materials, so they can get to know you.
- Never show up unannounced. School Food Authorities are often very busy and have broad diversity in their roles and capacities. Some may be running the whole show onsite at the school, while others are managing a complex program from a centralized office. Always call ahead, make an appointment if possible, and avoid busy times such as during lunch periods (i.e., 10 am to 1 pm).
- Share your expertise. Proactively sharing information about your operational cycles (production planning, planting cycles, product availability, etc.) will help you find common ground and support negotiations.
- Communication is key. Be sure to get direct contact information, ask them what their preferred mode of communication is (email, text, in-person), and establish follow-up actions.
- Remember, developing trusted relationships takes time. It may be necessary to start slowly and build trust through offering samples, piloting sales, and working with local food champions at the school, such as a farm to school coordinator.

Finding and Meeting with School Buyers

There are many opportunities for producers to connect face-to-face with school buyers. These can be incredibly beneficial, as they provide a critical opportunity for addressing market-specific questions about procurement processes and vendor requirements. If you are serious about school sales, consider some of these in-person opportunities:

- Attending relevant conferences and trade shows.
- Hosting a site visit on your farm.
- Attending an informational meeting. This is a meeting, often hosted by schools, in which the schools can do "market research" by connecting with you, a potential vendor, in advance of a solicitation, to get information to inform their process. This meeting is an opportunity for schools to explain the solicitation process and clarify and answer any questions you may have. It's also a good time for you to let schools know what you may be able to offer them (crop, volume, processing, etc.).
- Having a production planning meeting. This provides an opportunity for you and the school to plan collaboratively for the school menu and make decisions about what and how much to plant in order to prepare for the next school year.

Digging Deeper: Selling To School Markets

Written Case Studies:

- Local Produce through DoD Fresh in Montana (Grasmick Produce)
- Leveraging Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm)
- Farm to Food Hub to School (Alex McCullough and McKenna Hayes, Food Connects)

Podcasts:

- Bear Paw Meats (Carla Buck)
- Local Apples through DoD Fresh in Montana (Grasmick Produce and Swanson's Orchard)
- Leveraging State Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm)
- Farm to School to Farm Again (Alicia Ellingsworth, KC Food Hub and KC Farm School)

Videos:

- Farm to Food Hub to School (Food Connects)
- Frozen Fresh (Michigan Farm to Freezer)
- Growing Farm to School: Partnering with A Distributor (Amazing Grace Family Farm)

Worksheet 2A: Market Channel Assessment

Choose the Farm to School market channel mix that works best for you

There are many ways to get your products into schools—these channels offer diverse benefits and must be explored with key considerations in mind. The key is identifying a market channel (or multiple channels) that allows you to find the balance between what the buyer (the school) needs and what you, the producer, can reasonably produce and at what price you can produce it.

Brainstorm some advantages and disadvantages of each marketing channel. When comparing market channels, here are some factors to consider:

- How much time will it take? Similarly, does it require working certain days/hours?
- How will it affect my bottom line?
- Will it require additional equipment? Packaging?
- Will it require additional insurance? Certification?
- What kind of person-to-person relationships will I need to build?
- What are my personal preferences? For example, do I like talking to customers directly?
- How does the market channel align with my farm goal?

Unfortunately, there's no easy way to identify the perfect market channel for your farm or business operation. You'll have to weigh all the variables and make a decision based on what works best for you and what is available in your area. Think about what variables matter most to you and emphasize those in making your decision.

Using the table on the following page, rank the channels against each other. A "1" is given to the channel that is the "best" for each criteria. In other words, a "1" for Price means the highest prices you receive, a "1" for Risk means the least risky channel. In the Total Score column, simply add across for each channel. For Final Rank, give the channel with the lowest score a "1"; this is the **best channel**.

Notes (You can note qualifications to your ranking and identify pros and cons here):

Market Channel Assessment Worksheet 2A (continued)

Choose the Farm to School market channel mix that works best for you

1 being the best criteria (think #1!) and 5 being the worst.

	Direct to School	Intermediate (including food hubs)	Wholesale and/or Broadline Distributor
Profit margins			
Time investment			
Equipment, packaging, infrastructure			
Insurance, certification requirements			
Time spent marketing			
Brand identity			
Alignment to farm goal			
Risk associated with expansion –if needed			
Other			
Total			
Final Rank (1-3)			

Remember, the lowest number has the highest ranking for you!

Notes continued (You can note qualifications to your ranking and identify pros and cons here):

MODULE 3: CHOOSING THE RIGHT PRODUCT TO SELL TO SCHOOLS

Module 3: Choosing the Right Product to Sell to Schools Slide Deck

In this section you will:

- Identify the products and quantities that schools might purchase, based on the previous lesson on selling to schools.
- Assess which of your current products fit into school menus.
- Assess some value-added means to your farm.

Content	Learning Materials
A. Choosing the Right Product • Introduction — Identifying Your Product and Volume Based on the School's Needs • What to Grow • Understanding Menus and Preferences • Rethinking Volume- Scale and Frequency of School Deliveries • School's Food Needs — School Cooking Infrastructure — How Often • Special Events: "Crunch Time"; Farm to School Month	Module 3: Slide Deck Section A *(See handout from your instructor or look online)* • Case Studies: — **Video (online)**: Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, Arkansas School District) — **Written Case Study**: Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, Arkansas, School District) • Sample School Menu (See Appendix D), page 114
B. Product Development • What Range of Products Works with the School District's Needs — Raw/Unprocessed Products — Lightly Processed (chopped, frozen) — High Value-Added: Pre-Cooked or Processed • Options for Processing Raw Products Off-farm — Regional Processing Kitchens — Timing — Investing in Infrastructure for Minimal Processing • Financing Your Value-Added Products • Considering Costs and Pricing	Module 3: Slide Deck Section B • **Video**: Umi Organic and Camas Country Mill – Partnerships Yield Healthy Foods in Oregon Public Schools • Worksheet: — 3A: Product Planning Chart, page 32

This module will give you a better understanding of the type of product that might be a good fit for your chosen school market channel and how your product fits with the school menu. You will also explore how to determine the right quantity of your product and whether any adaptation needs to happen to meet the needs of the school district.

Key Terms from this Module

to help you communicate with buyers:

- Value-added
- Price Point
- Break-even Price

School Considerations for Choosing the Right Product

Do you already have a product in mind? If so, good work, you can skip this section! If not, the tables and worksheets in this section will help you narrow down a decision.

Keep in mind that school buyers are like any type of customer. They have preferences and specific types of products that will work best for them. Identifying a specific product that School Nutrition Directors or distributors have in mind is similar to evaluating a product mix for restaurants or farmers markets.

Communication is key to identifying the best fit for your farm and your buyers.

Revisit the menu in Appendix D. Adapt their monthly menu based on your products below.

MENU ITEM	YOUR PRODUCT

Determining Quantities and Rethinking Volume Requirements

The following table is excerpted from the USDA Food Buying Guide.[9] It can be used to determine the quantities of product needed, based on the school menu. You can find this table with all products on the school menu at: https://foodbuyingguide.fns.usda.gov

This guide can be tough to navigate, so reach out to some of the resource folks at your training if you get stuck.

Based on this guide, let's break down quantities for carrot sticks and/or beef for a school district with 500 kids participating in school lunch that has these items two days per week in May, for a total of eight days.

POUNDS PER 100 SERVINGS (Carrot Sticks)	NUMBER OF POUNDS PER DAY	REQUIRED AMOUNT FOR MAY
9.8 pounds	9.8 x 5= 49 pounds	49 pounds x 8 days = 392 pounds, or approximately 400 pounds++
Your fruit or vegetable product per 100 servings	Amount per day	Amount per month

9 USDA. 2019. Food Buying Guide for Child Nutrition Programs Interactive Web-Based Tool. https://foodbuyingguide.fns.usda.gov

POUNDS PER 100 SERVINGS (Ground beef)	NUMBER OF POUNDS PER DAY	REQUIRED AMOUNT FOR MAY
8.7 pounds	8.7 x 5= 43.5 pounds	43.5 pounds x 8 days = 348 pounds, or approximately 350 pounds/month
Your protien product per 100 servings	Amount per day	Amount per month

Product Development

In addition to knowing what products, when, and how much your school needs, you also need to consider whether they require some level of processing and post-harvest handling. Minimal processing may make the difference between the School Food Authority buying a local item or sourcing it from a wholesale distributor. Minimal processing might be easy to implement on your farm!

What does minimal processing mean? "Minimally processed" means food processed in a manner that does not fundamentally alter the food. Here are some examples to consider:

Most-purchased "minimally processed" fruits and vegetables in Washington State:

PRODUCT IN ORDER OF PURCHASE	TYPE OF PRODUCT
1. Lettuce	Chopped
2. Broccoli	Fresh florets, frozen
3. Carrots	Sticks, coins, shredded
4. Salad mix	Raw
5. Apples	Sliced, bulk, single-serve
6. Corn	Kernels, frozen
7. Peas	Shelled, frozen
8. Strawberries	Rinsed, Individual Quick Frozen (IQF)
9. Cauliflower	Florets, fresh or frozen
10. Blueberries	Rinsed, IQF

Lists all based on Farm to School WSDA Survey Findings –University of Washington NUTR 531. March 2012.[10]

When you do research and start communicating with the district, investigate which schools have labor and facilities for doing minimal preparation, such as combining, chopping, steaming, or baking. This will be apparent in the bidding process, or from the solicitation, and as you communicate and develop a relationship with the School Food Authority. If the school doesn't have capabilities, then consider farm-based processing, community kitchens, or aggregators that process.

If you are a livestock producer, recognize that processed meat will always require a state- or USDA-inspected facility. You can work with schools to identify the types of cuts that will work for the school district and specify these to your processor. For example, one-inch cubed kabob meat or ground patties.

10 School of Public Health. March 2012. WSDA Farm to School Findings. NUTR531 University of Washington.

Finding a Processor

Don't feel like going all-in on processing on the farm? Regional processing, or commercial kitchens, are licensed and inspected, and typically the space and equipment are available for rent. Some communities offer free space to do minimal processing as part of a community development project. Check with your local Chamber of Commerce, Small Business Administration, or Community Development Center to find one in your region. Another possibility is to look for a food hub in your region that has processing capabilities.

Need help finding a local food hub or commercial kitchen?
Call ATTRA for technical assistance!
1-800-346-9140

Time is money—factor in all of your costs!

- Opportunity costs—With shared facilities, you may have to wait to get a product processed
- Involvement—Food hubs and cooperatives require producer contribution and meeting attendance
- Transportation to and from the facility
- Time at the facility and cleanup afterwards
- Storage (freezer, dry, or refrigerated) rental prices

Financing Your Value-Added Product

Grants and low-interest loans are available for producers who want to develop a farm-based, value-added product to sell to schools and other markets. Any of these programs will require a carefully thought-out business plan and budget, which will be discussed in the next section. There will be further discussion of grant programs in the conclusion of this training and Digging Deeper sections of this module. Here are a few programs to consider for investing in processing infrastructure on your farm.

Grants:

- Value-Added Producer Grant is a federal program through USDA Rural Development
- Specialty Crop Block Grant
- Farm to School Grants – The FNS Farm to School Grants can help schools AND FARMS with infrastructure

Low-interest loans:

- KIVA is an alternative, interest-free, crowd-funded financing initiative for loans up to $10,000. https://www.kiva.org
- Farm Service Agency provides low-interest Microloans of less than $50,000, as well as Farm Storage Facility Loans to producers who do not qualify for a commercial loan. See https://www.fsa.usda.gov/programs-and-services/farm-loan-programs/microloans/index

Understanding Price and Pricing

Working with your school nutrition director can help you better understand where they are willing to substitute a local product and what they are willing or able to pay. Most Child Nutrition Programs require a solicitation process. Because of this, price doesn't have much flexibility. Producers set the price, based on the solicitation, with quotes or proposals, but it is good to have an understanding of what schools are willing to pay and what the break-even price is for that product. Having an understanding of which products have a lower cost of production will be a helpful start in identifying products that are good fit for school markets. Creative approaches to finding the right product for the school market and still allowing for a small profit include considering high-volume products, seconds, or product varieties that have lower costs of production.

***Price point** is important, but the price point is primarily dependent on your costs of production. What products on your farm could be a great fit for school sales? Think seconds, lower-grade products, and products with low costs of production.*

To understand and compare pricing when responding to solicitations, refer to other wholesale-market-channel pricing to get a baseline understanding. We suggest researching wholesale pricing for a point of comparison.

- USDA AMS Wholesale Pricing Guides (see Module 3 Digging Deeper section)
- Are you engaged in wholesale production already? What is the pricing for your other wholesale markets?
- Compare your break-even price with what your school can pay. You can determine these prices by looking at past bids, looking at a price sheet from a distributor, and talking to your School Food Authority.

Consider Other Ways to Add Value

Consider how your product might add value to schools besides through some type of processing. Is your salad pre-mixed? Can you deliver a fresh product on a weekly basis for schools with limited cooler space? Are you able to provide school visits to your farm? Are you able to help teachers with farm to school educational activities? What sets you apart from a national wholesale distributor?

Selling Seconds to the Schools

- *Vermont Valley Community Farm*
- *Blue Mounds, Wisconsin*
- *Retired, 2019*
- *Potato, Seed Potato, and CSA Certified Organic Farm*
- *Sold to Mount Horeb School District*

David and Barb Perkins ran the Vermont Valley Community Farm for 24 years, less than an hour west of Madison, Wisconsin. In addition to growing potatoes and seed potatoes, they had a CSA operation, and peak membership in 2012 was 1,300 shares. They were certified organic and the farm covered roughly 40 acres.

The Perkins' farm easily supplied their CSA operation, but they needed a market for their cosmetically imperfect seconds that wouldn't go into their CSA boxes. They contacted Mount Horeb School District and worked out a relationship with the Food Service Director there. The Perkins' didn't send all of their seconds – if something was really bad, it still went to compost. This sorting would happen naturally in their packhouse.

"Our CSA has benefited by getting Mount Horeb families as members, because we're making ourselves known," said Barb Perkins "It's a win – win. The parents are happy. We're happy."

The District trained their food service staff to work with the imperfect product, cut out the blemishes, and cook with the rest. Most of the produce ended up in the salad bar in September and October – the Wisconsin harvest season – and would also go into sauces and soups. The Perkins' could easily fill the district's entire walk-in cooler, which would be overwhelming to the food service workers. The local produce, however, lasted a lot longer and wouldn't need to be processed as quickly.

When serving product from Vermont Valley Community Farm, the school district would put up signs for the kids, letting them know that they were eating from a local farm. They also sent home letters to the parents.

References: Perkins, Jonnah Mellenthin. 2018. A Birthplace of CSA: Vermont Valley Community Farm. Edible Madison. June 29. http://ediblemadison.com/articles/view/vermont-valley-community-farm. Vermont Valley Community Farm. http://vermontvalley.com Chop Chop Culinary Skills Training. 2015. Chop! Chop! Peppers and Tomatoes. https://youtu.be/OdMYFjaYwj0

Partnering with Processors to Optimize School Sales

- *Amazing Grace Family F.A.R.M.*
- *Janesville, Wisconsin*
- *35 acres of diversified vegetables*
- *Livestock (beef) production*
- *Markets: CSA, farmers market, and farm to school*

In order for Chris Blakeney, sixth-generation owner of Amazing Grace Family F.A.R.M., to sell to his local school district, his broccoli needed to be processed. Amazing Grace Family F.A.R.M. (which stands for Fertility And Resource Management) has been a family-owned farm since the 1850s and has been using sustainable agriculture methods since the '70s. "We've had a CSA for nine years," said Blakeney in 2016. "[We've] had the local community share in the bounty of the farm. This [selling to school districts] is just a way to do that on a large scale."

Blakeney's relationship with the Janesville School District began with the district's Manager of School Nutrition, Jim Degan. Blakeney started by planting one acre for the school, and within three years expanded to 10 acres of broccoli alone for the school district. By now, he's planting 15 or more acres. Degen's main worry, however, was a lack of ability to predict how much broccoli he'd need before the year began. He also didn't know how he'd get the vegetables to the 21 schools in the district. Not to mention the bell peppers, cucumbers, and zucchini that Blakeney also had to offer.

The two connected with a light processor and distributor in their region that normally catered to restaurants. The distributor was able to commit to purchasing Blakeney's entire harvest. They sell the florets to the school district and turn the broccoli stalks into a slaw to be used by local restaurants.

By using the distributor, 67 school districts in Wisconsin can purchase Blakeney's product, and he effectively has no cap on his market. Anything he can grow, he can sell.

References: National Farm to School. 2016. Growing Farm to School. In partnership with the Center for Integrated Agriculture Systems at University of Wisconsin. https://youtu.be/JZgvNwB0SUU. REAP Food Group. 2016. The Path from Farm to School. In partnership with the Madison Metropolitan School. District Farm to School Program. https://youtu.be/GLKLk7mzU_0 Amazing Grace Family F.A.R.M. https://www.amazinggracefamilyfarm.com

Digging Deeper: Choosing the Right Product to Sell to Schools

Bringing the Farm to School Case Studies

- http://www.farmtoschool.org/bringingf2s-casestudies
- Written Case Studies:
  - — Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, Arkansas, School District)
- Videos:
  - — Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, Arkansas, School District)
  - — Partnerships Yield Healthy Foods in Oregon Public Schools: Umi Organic and Camas Country Mill (Lola Milholland, Umi Organic and Tom Hunton, Camas Country Mill)

Choosing the Right Product Tools:

- Accessing School Markets: Selling, Marketing, and Relationship Building – *NCAT PowerPoint Presentation. Contact the ATTRA 1-800 line for a copy of this presentation at 1-800-346-9140.*
- Connect with schools, Wisconsin Farm to School Toolkit – *Embedded calculators to help determine quantities.* https://cias.wisc.edu/toolkits/#farmers
- Farm to Institution Market Readiness, Food Service Buyer Interview – *Questions for that first meeting to help you narrow down your product mix.* https://finys.org/sites/default/files/uploads/finys_market_readiness_interview_questions_2018_0.pdf
- USDA School Food Buying Guide – *Use this guide to identify menu quantities.* https://foodbuyingguide.fns.usda.gov
- USDA Food Buying Guide Training Resources, https://www.fns.usda.gov/tn/food-buying-guide-training-resources

Financing Tools:

- FNS Office of Community Food Systems Farm to School Grants, https://www.fns.usda.gov/cfs/farm-school-grant-program
- Value-Added Producer Grants, https://www.rd.usda.gov/programs-services/value-added-producer-grants
- Specialty Crop Block Grant, https://www.ams.usda.gov/services/grants/scbgp
- KIVA – *an alternative, interest-free, crowd-funded financing initiative for loans up to $10,000.* https://www.kiva.org
- Farm Service Agency – *provides low-interest Microloans of less than $50,000, as well as Farm Storage Facility Loans.* https://www.fsa.usda.gov/programs-and-services/farm-loan-programs/microloans/index

Pricing:

USDA AMS Wholesale Pricing guides – *Give farmers the information they need to evaluate market conditions, identify trends, and make purchasing decisions.* https://www.ams.usda.gov/market-news/fruits-vegetables

Worksheet 3A: Product Planning Chart

Choose the Farm to School market channel mix that works best for you

Use this chart to outline how your products add value to your targeted school market.

This chart has been adapted from the Washington State Department of Agriculture to help producers assess current or future product and service offerings for school sales. It may be helpful in assessing how to improve a current product, deciding whether to offer a specific service, or determining when to contract particular areas of production to an outside business. Start in box "A" and move to the right, answering each question. Some questions may require more development, research, or future work. In box "G", start identifying next steps that may have emerged from previous answers or lessons learned.

What is the product or service that you will provide?	What problem is the product solving for the school?	What other solutions are available for the school?	How is your solution different than the other solutions?
A	**B**	**C**	**D**

What are the options for developing and differentiating your product? E.g., regional processing kitchen; farm processing, school and farm visits.	Rank the costs of production of those options from greatest to least.	Write down next steps in your Action Plan on Page 58.
E	**F**	**G**

MODULE 4: GROWING FOR SCHOOLS

MODULE 4: GROWING FOR SCHOOLS

Module 4: Growing for Schools Slide Deck

In this section you will:

- Assess your capacity for selling to schools.
- Further explore your price point for selling to schools
- Understand the infrastructure, planning, and food safety requirements that are needed to move your product into a school market.
- Learn best practices for planning to move your product from field to schools.

CONTENT	LEARNING MATERIALS
A. Business Planning for School Sales • Review how your farm goals align with school sales • Understanding Your Break-even Point • Using Enterprise Budgets to Determine Break-even Price • Return on Investment • Cost Calculators	Module 4: Slide Deck Section A *(See handout from your instructor or look online)* • Case Studies: — **Podcast**: Are School Sales Right for you? A conversation with Katrina Becker from Cattail Organics; Athens, Wisconsin — **Written Case Study**: Are Schools Sales Right for you? A conversation with Katrina Becker from Cattail Organics; Athens, Wisconsin — **Worksheet 4A**: Business Planning Considerations for School Sales ▫ Break-even Price and Return on Investment, page 36
B. Scaling Up Production—Meeting Increased Demand for School Markets • Understanding Scales of Production • Sustainable Growth—What is your Weakest Link? • Labor • Selling to Schools—Special Considerations • Meeting the Budget Needs of Schools • Meeting School Grading, Packaging, and Labeling Requirements • Food Safety • Managing Risks with Insurance	Module 4: Slide Deck Section B • Worksheet: — **Worksheet 4B**: Scaling Up Production for School—Evaluating your Weak Link and Strategies for Improvement, page 39
C. Crop Production and Planning • Planning and Goals • Planting Plan • Crop Planning: It is Not a Perfect World • Record Keeping and Profitability	Module 4: Slide Deck Section C Case Studies: • **Video**: Succession Planning and Season Extension for Improved School Sales; Living Root Farm; Hardin, Montana • **Written Case Study**: Succession Planning and Season Extension for Improved School Sales; Living Root Farm; Hardin, Montana • Worksheet: — **Worksheet 4C**: Planning Crop Production from a Bid Sheet Supplement—Online Excel based planning exercise, page 42
D. Livestock Production Planning • How do Livestock Products Fit on the Plate? • How Do Your Products Fit with School Demands? • Determine School Needs • Assess Current Production • Plan Production Based on Demand • Eggs (special considerations)	Module 4: Slide Deck Section D Case Studies: • **Podcast**: Bear Paw Meats: Profile of a Ranch Making School Sales Work • **Written Case Study**: Bear Paw Meats: Profile of a Ranch Making School Sales Work • Worksheet: — 4D: Livestock Production and Planning – Capacity and Product Assessment, page 45
E. Navigating Food Safety Standards When Selling to Schools • How to Identify Food Safety Requirements of School Food Authority • Meat-Processing Considerations	Module 4: Slide Deck Section E Case Studies: • **Video**: Working with Schools to Meet Food Safety Expectations without GAP Certification. Common Ground Farm; Wappingers Falls, New York • Written Case Study: Working with schools to meet food safety expectations without a GAP Audit. • Worksheet: — 4E: Communicating your Food Safety Protocols to School Food Authorities—Risk Assessment, page 48

As a producer, you know that if you want to engage in school markets, you need to understand how these markets will affect your production costs. There is no better way to do that than revisiting your business plan. This section is heavily focused on business and production planning to meet the school market channels and product mix identified in previous modules.

Key Terms from this Module

to help you communicate with buyers:

- Price Point
- Break Even Price
- Enterprise Budget
- Return on Investment
- GAP: Good Agriculture Practices
- HACCP: Hazard Analysis Critical Control Point
- FSMA: Food Safety Modernization Act

Business Planning for School Sales

From Goals to Planning

After learning about the options for selling to schools and thinking about your product-development strategies, take some time to review the goals you outlined at the beginning of this program in your School Business Action Planning Guide (Appendix A).

At this point your goals related to school sales should reflect:

- Why you want to sell through schools.
- How you intend to sell to schools.
- The type of products that you will start with.
- *Do you need to adjust anything?*

Price Point

Basic business and financial-planning experience is expected when selling to schools. Price point has been identified through producer and farm to school advocates as one of the top barriers for for producers accessing school markets.[11] There are so many options to think about when it comes to price point. For example, in the last module you thought about ways to identify the right product mix that works financially for school sales.

Break-Even Analysis

Before responding to a solicitation or working with a distributor, it is important to have an understanding of the break-even point for the enterprise/product that will be sold to the school district.

This kind of analysis is typically done through an enterprise budget. Enterprise budgets have an income category. You can get a pretty good idea of what kind of price to expect for your products though the bidding/solicitation process or through conversations with school buyers. Also, understand that you will provide the price for your product to the school, it is up to the school to accept that price.

Tools and Examples

There are many tools and calculators that can help you figure out your expenses and how to set up an enterprise budget. Enterprise budget templates are available for most farm products. Do some research in your state and identify regional or local resources, because some of the expenses will vary by region. Connect with Extension in your county. They should be a part of your team. Look in the Digging Deeper section on page 50 for some enterprise budget templates to get you started.

Partial Budgeting

Another approach is to do a partial budget analysis, which uses annual income and expense changes to study the impact of a new business idea on your business profitability, or cash flow. Partial budgets are also excellent for evaluating the purchase of equipment. Researching the balance between the added income you will have from your new market channel versus the costs of entering into that channel will give you a rough idea of whether that channel will be profitable, or not.

POSITIVE EFFECTS OF NEW MARKET	NEGATIVE EFFECTS OF NEW MARKET
Labor cost savings from no longer sitting at a farmers market	Less return on product
Simpler lifestyle—less time spent marketing	Higher costs for packing shed

Table adapted from Planning for On-Farm Success[12]

11 Bringing the Farm to School: Needs Assessment Outcomes Report. January 2020. National Center for Appropriate Technology and National Farm to School Network.

12 Renn, D. et al. 2017. Planning for on Farm Success. Manual and Workbook. Community Food and Agriculture Coalition

Photo: NCAT

Return on Investment

If a significant investment in infrastructure will be required to move your product into school sales, a return on investment calculation should be done. This equation helps you plan on scaling up to the volume you need to get to in order to meet a competitive price point. Calculate return on investment for products such as:

- A larger walk-in cooler
- Freezers
- Packing shed equipment, harvest, and wash station adaptations

Profitability is the difference between the value of goods produced and the cost of their production. An example of a return-on-investment calculation for investing in a walk-in freezer to increase school meat sales would be:

- Net income/cost of the investment = $20,000 (beef sales to two schools and restaurant sales for high-end products)/ $12,000 (cost of freezer)
- The Return on Investment for this product: 1.6%

On a basic level, if an investment has a positive ROI, it means that you are effectively converting your assets into a solid profit. If the ROI is negative, it means your costs are greater than the benefits.

Katrina Becker on Working with Schools on Price

Kat's first motivation for selling to schools was to cycle resources in her own community. Now it has become a nice, well-planned part of their farm income with the last few years bringing in $16 to 25K in school sales. That is more than it has been in the past, but school sales have regularly brought in $5 to 10K.

Originally, Kat thought about competing with distributors on their pricing, but they just don't do that on the farm in general any more. They do good recordkeeping on costs of production and the profitability of each crop grown on the farm. Their price would be considered very high by wholesale standards. For example, their carrots are sold at a baseline of $2/pound. They will sometimes offer discounts for large quantities or if there is some variability in the product, but this is standard for all of their wholesale accounts. Kat mentioned that their food service directors are happy to pay more because they have little waste. Lettuce is a good example of that. Their baby lettuce mix is $7/pound, but virtually none of the product is thrown away. The food service director at the Wassau School district has said they can expect to throw away from 1/3 to 2/3 of the product from a distributor. Kat suggests that is something to consider when trying to distinguish your products from the products that the food service director gets from a distributor.

To read the full case study or listen to the conversation with Katrina, visit this page: http://www.farmtoschool.org/bringingf2s-casestudies

Photo: Cattail Organics

Worksheet 4A: Business Planning Considerations for School Sales – Break-even Price and Return on Investment

Use enterprise data that you have through your cash flow documents and past sales data to determine a break-even cost for the product you will sell to schools.

What product will you be selling to schools?	
Example: potatoes	
How much product (in pounds) is needed by the school for the school year (280 days)?	
Example: For 100 meals per day, 15.2 pounds needed. See OK FTS Produce Calculator in "Digging Deeper" section	
What is the price per pound?	
Assume $1.00/lb or enter your own value	
What are your fixed costs *for this enterprise*?	
Mortgage/rent, Equipment payments, Utilities, Taxes, Insurance, Salaries, etc.	
What are your variable costs *for this enterprise?*	
Fuel and Transportation, Seed, Processing costs (livestock), Inputs, Fertility, Amendments, Maintenance, Labor, etc.	
What is your break-even price?	
Margin = Sale – Variable costs	
BE = Fixed costs (Margin ÷ Sales)	
What is the profit/loss for this enterprise?	
Profit = Sales – Break-even price	
If you have a loss for this enterprise, how can you get around a set price point?	
Example: Lowering your cost of production, using seconds, etc	

Scaling Up Production: Meeting Increased Demand for School Markets

Evaluating your current and future scales of production is an important consideration for selling to schools. Most importantly, the current scale must represent a good fit for your management skills.

A farm can start off with basic tools, equipment, and infrastructure, but, ultimately, a wider range of investments may be necessary in order to sell to schools. This may result in taking on farm debt/loans for expansion, which is often tied to mechanization. Careful planning should result in a return on investment that the farmer is comfortable with.

Your Weakest Link

One way to approach planning is to distinguish the weakest link on your farm. A weak link is an enterprise or condition that is holding you back from progressing toward your goals and limiting your ability to be more profitable.

Your farm or business operation is only as strong as your weakest link

Ask yourself, "Which of these factors limits my ability to sell to schools profitably?"[13]

- ***Production****: Fertility, water, disease, weeds, pests, seeds, soil quality, knowledge and experience*
- ***Harvest and Post-harvest****: Harvest and pack efficiency, temperature-management capacity*
- ***Quality Control****: Food safety, temperature management, grading, packaging*
- ***Livestock****: Stock health, grass management, breeding, supplies*
- ***Mechanical****: Equipment operation, maintenance, and repair; building construction and maintenance*
- ***Business****: Recordkeeping, legal matters, sales communication, contracts*
- ***Financial****: Access to capital, cost of production and profitability, accounting and financial planning*
- ***Employees****: Training, expectations, efficiency, communication, longevity; access to skilled labor*
- ***Communication and Decision Making****: Facilitation, skill level, systems and processes*
- ***Market****: Access to, development level of, quality of buyer relationships, sales, brand identity*

Once you have identified these limiting factors, determine which one, ***and only one,*** is preventing you from selling to schools. ***All other factors are considered challenges; however, they are not causing a log jam to your farm business.***

When considering selling to schools, focus on capacity, consistency, and infrastructure. These considerations can be addressed by asking yourself the following questions:

- Can you satisfy your school buyers' requirements?
- Can you comply with food safety and quality standards?
- Do you have the ability to move more product through your washing, packing, or processing facility?
- Do you have enough space in your cooler, your delivery truck, etc.?
- Do you have an advanced accounting system to track sales and payments?
- Would you need to bring on more workers? Do you have the capabilities to manage a larger staff?

Labor

Not only do you need to determine how much labor will be required in order to sell to schools, but you will also have to evaluate labor costs as well as analyze cost differences between labor and equipment and other variable expenses. As an agriculture employer, farmers MUST:

- Know federal and state laws. See the following resources:
  - — https://www.dol.gov/agencies/whd/state/contacts
  - — https://www.dol.gov/agencies/whd/agriculture
- Set up an accounting system and keep receipts for:
  - — Income: 3 years
  - — Expenses: 3 years
  - — Payroll: 4 years
- Withhold payroll taxes
- Provide safe working conditions and carry Workers Compensation insurance

13 Diffley, Atina. 2012. Quality of Life: Tools And Systems For A Healthy Farming Partnership

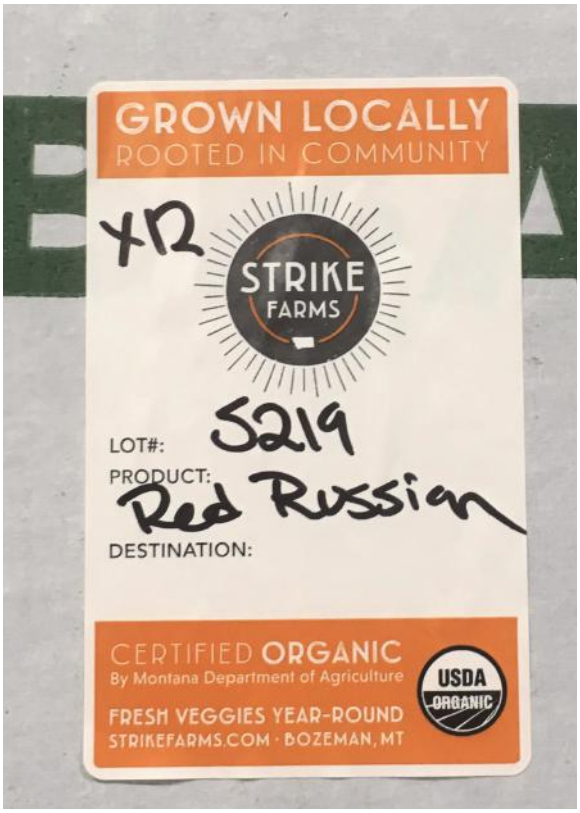
Pricing Considerations and Scale

With the price per unit from school sales likely being less than direct-market channels, you must be able to meet your needs while also charging a price that the school can afford. Therefore, consider finding efficiencies through scale, labor savings, utilizing seconds or culled products, input cost savings, etc.

The plan to scale up may require that a farm offer a line of credit to the school and have the capital or access to credit to meet monthly farm expenses. Schools usually have billing requirements, and these may impact a farm's cash flow. Net-30, Net-60, or Net-90 payment terms, where payment for products is due in full 30, 60, or 90 days after the transaction has completed, are typical. National Wholesale Distributors can have an even longer payment term. Consider offering a discount to schools that are willing to set up Net-30 payment terms. While it may mean a lower price point, it can help you out with cashflow.

Grading, Packaging, and Labeling Requirements

Schools will often specify standards on package size, weight, pallet stacking, and traceability in their solicitations; however, some schools may or may not understand industry standards for grading, packaging, and labeling. Most National Wholesale distributors will require adherence to USDA packing standards. This raises considerations with your post-harvest handling procedures and packing line and is an important topic to discuss with the School Food Authority.



Label key included- with Julien Date; Field locations; harvester, etc.

- Name and address of the farm
- Julian Date—the continuous count of days from January 1 *(for Example 6/18 would be 169)*
- Product
- Grade
- Quantity/Count
- Harvest or Pack Crew Identification
- Certifications, e.g., Certified Organic]

Insurance and Managing Liability

Selling to schools will require a certain level of liability insurance. Some solicitations will identify the level of insurance required. A farm may also want to consider additional protections in case it is unable to meet the requirements set forth in a school contract. This may include Whole-Farm Revenue Protection insurance or some type of catastrophic coverage. Some insurance programs, such as the Food Liability Insurance Program (FLIP), offer coverage specific to value-added products.

Worksheet 4B: Scaling Up Production for School Markets – Evaluating your Weak Link and Strategies for Improvement

"One, and only one, weakest link accounts for the strength of the entire chain, regardless of how strong other links might be. To strengthen a chain, one must always attend first to the weakest link. Other links (adverse factors), no matter how frail they appear, are essentially non-problems until the weakest link is first fixed" (Allan Savory and Jody Butterfield, Holistic Management).

From the production elements below, write one or two deficiencies you are currently experiencing that could adversely affect your ability to scale up for school markets.

Production	
Harvest and Post-harvest	
Quality Control	
Mechanical	
Production	
Business	
Financial	
Employees	
Communication and Decision Making	
Market	

From the list you made of weak links, which one of them is your weakest link; the one that should be fixed before any others can be addressed?

Identify the Root of the Problem and Develop Strategies to Address It: The Five Why's

Finding the root cause of a weak link can be accomplished by answering five *why* questions (see the "Five Why's" text box below for an example). Write your five questions below to get to the root cause of your weakest link.

1.	
2.	
3.	
4.	
5.	

The 5 Why's (some examples)**:**

Why did the tomato crop have fungal disease?
- Because the field is consistently wet.

Why is the field consistently wet?
Because the soil doesn't drain.

Why is the soil compacted?
Because it lacks soil microbial life and aggregate stability.

Why is it lacking in soil microbial life?
It has been over-cropped and needs a soil-building crop.

What is the root cause?

What strategy will you employ to address it?

Crop Production and Planning

Crop Production Planning

Production planning is essentially matching production to the demand of your markets—in this case, the school market. Production planning can ensure that you are able to meet the solicitation requirements, including the quantity and frequency required.

Start with the End in Mind

Determine demand and work back from harvest to planting. Is the product required weekly, monthly, or annually? The sales agreement will determine the specific amount and types of crops.

Discuss with the School Nutrition Director how you will handle unexpected results. The school will need to know if you cannot fill an order, so they can switch to another source if there is a crop failure. This can put both parties on better footing at the beginning of the season, if they both know there are options. Additionally, with specific agreements on volume and timing, it will be important to plan for yield loss due to pests and disease. Consider fluctuations in timing from weather. Bracketing the harvest date by one to two weeks on either side can help address this.

Consider an example such as carrots for a school lunch program

(use Johnny's Seed Calculator)

- Find yield per acre, row, or plant.
- Identify harvest targets and space requirements.
- What is the production goal? (see the solicitation)
- How much seed will be needed?
- Plan for enough space and where it will be on the farm.
- Yield calculations will help you identify the amount of space required: plant spacing and number of rows/plants/acres.

Use records as the basis for your loss percentage. If your yields from past years vary slightly, use a small loss percentage. If the past yields vary greatly, use a larger loss percentage in your estimate of future production needed to fulfill the current contract. (Also, get an understanding of the cause!) Plan to have crops come in one to two weeks before the target harvest date, in case cold/overcast weather slows crop growth. Also, plan for a product that will be harvestable one to two weeks after the target harvest dates, in case warm weather causes crops to mature more rapidly.

Recordkeeping and Planning

For crops, Johnny's Selected Seeds offers production calculators to help with initial yield and space requirements, but recordkeeping will also help you succeed in understanding which varieties do best for school markets and timing. Generic enterprise budgets can give guidance, but there is no replacement for a given farmer's actual historic data. Farmers who measure all their efforts, record all the measurements in an accessible database, and can manipulate the data in order to get estimates of future expenses and revenues have a better chance at success with school sales.

Farm to College

Adapted from the ATTRA Publication Scaling Up for Institutional Markets: Midwest Case Studies IP501

Ben Doherty and Erin Johnson own and manage Open Hands Farm, Northfield, Minnesota, which operates as a CSA farm and also sells to nearby institutional clients.

Tips from Open Hands Farm:

- Create a good system of crops laid out uniformly in a bed system with the cultivator and tractor to match. Equipment can be adjusted or set permanently to match bed spacing. Right now, Doherty says their tractor-tire width is set for 40-inches-on-center end-row spacing.
- Have a strong interest in the success of your customers. Help make it work for each other. It takes teamwork.
- Prioritize relationships and communication. A newsletter or blog is an important tool to help customers understand your operation. The better customers understand what's going on, the better your relationship will be.
- Quickbooks can be a really helpful tool for recordkeeping. Even so, we don't attempt to do our own taxes. We use an accountant, which "has been worth every penny."
- You have to have crops that match the customer's interest. It's easy to get excited about a big buyer, but to make it work long-term, it has to be a good fit. Take the time to learn how they operate.
- Don't forget about the potential of mechanization for small operations. To be profitable can sometimes cost more money. Doherty says he and Johnson try to invest to make the best use of their capital of time, energy, and money: "A lot of the time for us, it's been a series of smaller investments. You also can choose not to grow or spend money if you want to stay small, and that can make sense, too."

Worksheet 4C: Planning Crop Production from a Bid Sheet

Materials needed: Solicitation Packet from Appendix C. Choose a solicitaiton from the packet.

- Johnny's Direct-Seed Crops Chart
- Johnny's Transplant Seed and Yield Chart
- UGA Vegetable Planting Chart
- Johnny's Seed Calculator (online tool)

Resources: Crop Planning for Vegetable Growers–Resources

Bid Sheet Exercise	
When is the bid due?	
In what form should bid pricing be submitted?	
What day of the week are deliveries accepted?	
Is a food safety plan required?	

Using the bid sheet and seed, yield, and planting charts, determine plot size and number of seeds/plants needed to meet the school demand for yellow squash for eight weeks. Or use your own product!

	Example: Carrots	**Your plan: Weekly delivery for eight weeks**
Production goal (pounds)	15 pounds per week, 120 pounds total	
Yield in pounds per 100 row feet	150 pounds	
Your row length	50 feet	
Plants *(if transplanted)* **or seeds** *(if direct seeded)* **needed** (Johnny's Seed Calculator)	(transplants not needed for carrots) 1,500 seeds	
Rows needed Yield goal ÷ ((your row length ÷ 100) x yield per 100 ft row)	120pounds ÷ (.5 x 150) = 1.6 rows	
Space (sq ft) needed for crop (row spacing X number of rows) x row length	(3 x 1.6) x 50 = 240 square feet	

Livestock Production Planning

Questions to consider:

- What is your production potential, in pounds, of meat and specific cuts?
- What is your break-even price?
- Do you have the acreage and grazing/feeding management skills to meet the scale needed and sell your products above break-even cost?

It is likely that a school is already serving meat, so if the school can take it in the form in which the producer can provide it, and for an affordable cost, substituting your local product may be likely. Meat can be used year-round, so provisioning meat is likely to require higher volumes than seasonal vegetables.

Key Concepts with Meat Are Versatility and Cost

Because proteins are the most expensive part of a school meal, consider the cost and versatility of various options that you can offer. For example, ground beef can be shipped frozen and used in various recipes, such as burgers, meatballs, casseroles, meatloaf, tacos, spaghetti, sloppy joes, and stew. Also, think about the cuts or parts that don't fetch top dollar, like dark-meat turkey, for example, and consider marketing higher-value cuts directly to restaurants or direct to consumers. Some schools can purchase whole beef and auction off the higher-value cuts to staff/families to offset cost. There are all types of opportunities if you are creative.

Meat portion sizes in schools are usually 2 to 3 ounces per serving. A school serving 100 students would need approximately 12.5 to 18.8 pounds of meat per meal. Versatile cuts and products like ground beef; chicken breast, thighs, or wings; and bulk eggs work well in school kitchen settings.

A lot of communities are having whole-animal discussions. You may have another market for common items like chicken breast and wings, but no market for less-popular products like chicken legs. Talk with the School Nutrition Director about how to incorporate these meat products into school meals at an affordable rate.

Packing and Packaging and Processing

For most school districts, smaller packaging may be better for kitchen efficiency, e.g., 5-pound chubs of ground beef or bulk frozen chicken pieces. This gives the kitchen versatility in preparing various meals. Frozen products allow longer shelf life and increased ease of handling.

Some schools prefer larger bulk-pack sizing, however, especially if they have a central kitchen, to bring pricing down and reduce package-opening labor.

For processing, you will need a state- or USDA-inspected facility. Find out what your school district requires. All states that participate in the state meat and poultry inspection program (MPI) can take state-inspected meat. Otherwise, it must be federally inspected. Meat must be federally inspected if it's coming across state lines, regardless. To find federal and state-inspected processing facilities in your state, visit the following directories:

- Meat, Poultry and Egg Product Inspection Directory
- Niche Meat Processor Assistance Network

Here is a list of the 27 states that participate in the MPI program. Schools are not always educated about this, so it's important to explain.

- States Operating their Own MPI Programs

Supplying Schools

How do you know if your supply will meet school demand? Large ranches will already have established processing contracts and can direct ground beef to schools and sell higher-value cuts through their traditional marketing channels. Small farmers may need to consider combining animal production with neighboring farmers—and using an inspected facility—to achieve needed scale, or they may market to smaller school districts.

The Livestock Compass is a spreadsheet tool developed by the University of Wisconsin Center for Integrated Agriculture Systems. It is designed to assist producers who sell products in multiple market channels, including direct marketing and sales to schools. Use this, or the other resources listed below under Digging Deeper, to help you plan production and determine profitability.

Assuming there are roughly 260 pounds of ground beef per carcass, if other sub-prime cuts are marketed separately, one carcass would supply enough ground beef for 13 to 20 school lunches. Your carcasses may supply more or less, based on the meat cutting guide from your processor. For more details see How Much Meat to Expect from a Beef Carcass.

Eggs

Schools need eggs, and you may be able to add an egg enterprise to an existing farm to add value through school and direct-marketing sales. Most schools use liquid eggs or have an outside processor manufacture egg products, so switching to local eggs could also take a significant process shift and will require communication and logistical planning with the School Nutrition Director.

Egg-production considerations include number of birds, infrastructure, processing, and packaging. The questions to ask and consider are the same as above, but special factors to consider are seasonal changes, summer vs. winter production, number of birds needed based on school demand.

Eggs are considered a minimally processed product, with washing and packing only. Grading should be conducted, as all eggs sold must be USDA-graded (candling, size). This USDA memo helps to clarify the meat and egg procurement requirements: Procuring Local Meat, Poultry, Game, and Eggs for Child Nutrition Programs.

Beef to School at Bear Paw Meats

Adapted from Montana Beef to School Coalition: Beef to School Case Studies

Photo: Bear Paw Meats

Bear Paw Meats is a family-owned, vertically integrated cattle, feeding, auction, processing, and retail meat enterprise serving the Central Hi-Line region of Montana. Vertical integration means that the company owns and operates the supply chain for the final product (produce feed, ranch cattle, and process meat). With a background in agriculture, the Buck family purchased Bear Paw Meats in 2006. The operation's owners, Karla and Dexter Buck, operate Bear Paw Meats along with several of their children. Their operation includes a state-inspected facility, allowing their products to be sold to practically any buyer within the state of Montana.

Since 2008, Bear Paw Meats has been selling products to K-12 schools in their region for use in the school lunch program. Each year, Bear Paw Meats tries to grow their beef to school program by adding another school. Schools primarily utilize Bear Paw Meats' ground beef in their menu offerings. Items like tacos, lasagna, sloppy joes, hamburgers, spaghetti, and a variety of casseroles are regulars on school menus. Some schools that work with Bear Paw Meats also utilize roast beef in addition to ground hamburger. Selling beef to schools has also opened the door for Bear Paw to sell pork sausages to schools for their breakfast programs.

Bear Paw Meats delivers orders to schools on a regular schedule. Customers place their phone orders and receive weekly or bi-weekly deliveries. There are several factors that Bear Paw Meats has considered for maintaining a beef to school program. With regard to food safety, Bar Paw Meats follows guidelines for state-inspected facilities and safe delivery practices for every customer. As such, the business does not need to modify its food safety practices specifically for schools. Working with schools has required that the business stay informed about nutrition guidelines for protein in the National School Breakfast and Lunch Programs. A majority of the schools that Bear Paw Meats works with have enough storage space to receive beef every other week. They have promoted their beef to school program to other schools that would require deliveries once per week. To process beef for schools, the operation purchased a new grinder for ground beef. Bear Paw Meats markets their beef to school program directly to schools. In the future, they plan to provide information in their advertisements about involvement with beef to school.

Supporting a beef to school program takes time on behalf of Bear Paw Meats to educate the school foodservice directors on how to set up orders and deliveries with a new and smaller business and use raw and local beef products in the kitchen. The business has experienced that some communities are more supportive than others of local beef and farm to school products in general. Consequently, the business looks to educate consumers about the many benefits of local beef. In some schools, students are aware that the beef in their lunch is provided by a local animal, processed in a local processing facility, and delivered by a local company to them. Bear Paw Meats sees community support as key to growing beef to school programming in the future.

To read the full case study or listen to the conversation with Karla, visit this page: http://www.farmtoschool.org/bringingf2s-casestudies

Worksheet 4D: Livestock Production and Planning – Capacity and Product Assessment

You are considering selling ground beef to a school serving 100 students that needs 15 pounds of beef total per meal for two meals per week. How much product will be needed for a 40-week school year? Can you meet the demand? After calculating supply for two meals per week, assess your capacity to scale up to five meals per week.

Materials: How Much Meat to Expect from a Beef Carcass

	Example: Beef	Assess your enterprise
# of market animals	20	
Average weight	1,100 pounds	
Pounds meat per animal	475 pounds	
Pounds of ground / processed product	80 pounds	
Total pounds	80 x 20 = 1600 pounds	
Pounds needed per week	30 pounds	
Weeks of sales	1,600 ÷ 30 = 53 weeks	

Navigating School Food Safety Standards

Many farmers believe that selling to schools will require additional food safety requirements, but the USDA Child Nutrition Program does not have additional food safety requirements for sourcing local products compared to other markets. Producers must follow all applicable federal, state, and local rules and regulations governing their business.

There are myriad resources on food safety. Every state has a designated produce safety coordinator to help produce farmers understand their state and federal requirements. Similarly, the state's department of agriculture can help livestock farmers navigate their food safety standards.

FSMA, GAPs, HACCP: What's the Difference?

The Food Safety Modernization Act, or FSMA, Produce Safety Rule is an example of a federal law that applies to produce farms. Because this is a federal program, CNPs may ask if you are compliant with the standards, but they are not "required" to ensure that you are in compliance in order to buy a product from your farm. FSMA has seven different rules. The FMSA Produce Safety Rule provides minimum food safety standards for growing, harvesting, packing, and holding fruits, vegetables, mushrooms, and sprouts intended for human consumption and is the most relevant for the purposes of this manual. The Produce Safety Rule outlines a series of best practices that are intended to prevent contamination of produce during production, harvesting, and post-harvest[14]:

- Worker Health, Hygiene, and Training
- Agricultural Water for Pre- and Postharvest Uses
- Biological Soil Amendments
- Domesticated and Wild Animals
- Equipment, Tools, Buildings, and Sanitation
- Required Records

Food Safety Modernization Act (FSMA) Produce Safety Rule (PSR)[15]

- The FSMA PSR establishes standards for the safe growing, harvesting, packing, and holding of fruits and vegetables grown for human consumption.
- If you grow, harvest, pack, or hold fresh produce, this regulation may apply to you.
- The FSMA PSR provides several exemptions and exclusions based on total produce sales, total food sales and end users, commodities grown, commercial processing activities, and personal consumption. To understand whether your farm or packinghouse is not covered or exempt from this regulation, review this FDA fact sheet.
- Producers should note that buyers may require additional food safety practices or third party audits beyond the FSMA PSR, so it is important to be aware what market requirements may need to be met.
- Education and training opportunities focused on the FSMA PSR can be found at the Produce Safety Alliance.
- FSMA also includes several rules aside from the PSR that may apply to food producers. For more information, visit the FDA website.

GAP Certification: Good Agricultural Practices

What is GAP certification? GAP is a voluntary program and it is very much market-dependent. It only applies to fruits and vegetables. The certification is done by a third party, similar to organic certification. It is often done within your state department of agriculture. As mentioned above, the standards for GAP certification are very similar to FSMA.

National wholesale distributors, such as Sysco and food service management companies, will likely require GAP certification, or even standards and requirements beyond GAP. Smaller food hubs and other regional distributors may have group GAP. They are oftentimes more willing to help producers become GAP-certified or allow certain food safety protocols to take the place of a GAP audit, such as having a food safety plan, attending trainings, and having a current water test on file.

The cost associated with GAPs certifications may or may not be a barrier. The cost of an audit averages around $1,000, but you'll also need to factor in travel for the auditor. Farmers can save costs by consolidating several farm audits into one trip for the auditor.

Some distributors participate in Group GAP. Group GAP allows groups of small producers to pool their resources to conduct food safety training programs and share the cost of certification, including audits. Upper Peninsula Food Hub in Michigan, Organic Valley in Wisconsin, and Western Montana Growers Coop have all instituted Group GAP that helps their producers become GAP-certified.

HACCP: Hazard Analysis Critical Control Point System

Some distributors and other marketing channels that are not familiar with food safety may refer to HACCP plans and may request a HACCP plan from a produce farmer, not knowing that farmers follow food safety plans, not HACCP plans. HACCP is

14 Food and Drug Administration https://www.fda.gov/food/food-safety-modernization-act-fsma/fsma-final-rule-produce-safety

15 Produce Safety Alliance – Grower Training Curriculum https://producesafetyalliance.cornell.edu/training/grower-training-courses

a process of identifying the hazards, establishing controls for the identified hazards, monitoring the controls, and periodically verifying that the system works to identify risks and control hazards in food production.

HACCP mainly applies to food processors and livestock- and seafood-processing facilities.

The Seven Principles of HACCP

- Conduct a hazard analysis of all steps in the production process
- Identify the critical control points
- Establish critical limits
- Monitor critical control points
- Establish corrective action for deviations from plan
- Verification—audits, record reviews, calibration, testing
- Recordkeeping

Meat Processing and Food Safety

Most meat producers will be taking their product to a processor. It is important to understand the difference between state- and USDA-inspected facilities and know the requirements of the school district. USDA-inspected facilities are fewer and further between and can be more expensive. The USDA memo titled "Procuring Local Meat, Poultry, Game and Eggs through Child Nutrition Programs" describes the three agencies within the Federal Government that are responsible for establishing the rules and regulations that govern the sale and use of meat, poultry, game, and eggs in the Child Nutrition Programs: the U.S. Department of Agriculture (USDA) Food Safety and Inspection Service (FSIS), the Department of Health and Human Services (DHHS) Food and Drug Administration (FDA), and the USDA Food and Nutrition Service (FNS). Together, these agencies establish rules and regulations to ensure that foods are safe, wholesome, and correctly labeled and packaged. The School Food Authority will be aware of the packaging and label requirements for meat products being solicited.

See also ATTRA's Working with Your Meat Processor for tips on developing a relationship with a meat processor, including understanding the processor's needs, understanding your role in producing an excellent product, and having realistic expectations in terms of timing and cost.

New Mexico's Approved Supplier Program

Leveraging Partnerships to Access School Markets: Part II

You met Alma Maquitico, farmer and director at the Anthony Youth Farm, in Module 2 (see page 21). In Part I of this case-study series, Alma shared her experience with New Mexico's purchasing cooperative. In Part II, below, Alma talks about her experience with the state's Approved Supplier Program. During the 2018-19 school year, New Mexico's Public Education Department (NMPED) piloted a cooperative of school districts to streamline procurement and vendor requirements and support small growers of color in building the necessary capacity to sell to schools. The bid received 20 vendor responses from state-based distributors, food hubs, farmer cooperatives, and individual small-scale farmers interested in selling to schools – including Alma and the Anthony Youth Farm. The bid was set up as a yearly contract between the 20 vendors and 10 school districts with the option to renew annually for up to four years. To learn more about the state purchasing cooperative, see page 21 in Module 2.

The inception of the New Mexico Grown Approved Supplier Program came from what Kendal Chavez, Farm to School Specialist at NMPED, learned through facilitating the purchasing-cooperative bid process: that farmers can meet Request for Proposal (RFP) requirements easily without a lot of pushback around food safety. With 20 vendors and 10 school districts participating in the purchasing cooperative, NMPED decided to give the Approved Supplier Program a go. In action, Kendal describes the program as having two major components:

- standardizing food safety-related requirements for participating vendors
- incentivizing school districts to buy local by using appropriated funds only to reimburse purchases from approved vendors.

The driving goal of the program was to provide options for small farmers who may not have the capacity, resources, or even the need to be Good Agricultural Practices (GAP)-certified. Currently, 3 to 4% of producers in New Mexico are GAP-certified, and it has yet to be a market requirement in the state. "The procurement piece isn't solving the capacity issue [for small farmers] so we're looking at it from a different angle," Kendal explains. Both the purchasing cooperative and Approved Supplier Program have had significant positive impacts on small producers like Alma. "It's been amazing – it created a system that allows us to sell to grocery store like Whole Foods. It provided a structured program for how to meet food safety, traceability and labeling and packaging needs [for a variety of buyers]. It opens markets. Ultimately, it has allowed us to be more economically self-sufficient." *To read the full case study or listen to the conversation with Alma, visit this page:* www.farmtoschool.org/bringingf2s-casestudies

Worksheet 4E: Communicating your Food Safety Protocols to School Food Authorities – Risk Assessment

The food safety risk assessment is a tool you can use to:

(1) Assess your farm's food safety risk-management activities and

(2) Describe how you manage risks to buyers, to demonstrate how you address food safety issues on your farm. Use the Mitigation Strategy column to draft your own mitigation statement for your buyers.

Note that this is not meant to replace FSMA: Produce Safety Rule if you are not exempt from those requirements.

Production Practice	Mitigation Strategy
Water for Irrigation **Risk:** Human pathogens can be introduced into water and contaminate produce during growing activities. **Risk Assessment:** Source (ground, surface, municipal), application method (drip, sprinkler, etc.), timing, water pathogen testing	
Well Contamination **Risk:** A properly constructed well that is regularly tested and shown to meet microbial criteria can be as safe as public water supplies, but groundwater that is subject to contamination by the surface environment can have risks more similar to surface waters. **Risk Assessment:** Well's physical integrity, animal access to well site, backflow prevention	
Livestock and Wild Animals **Risk:** Animals harbor pathogens **Risk Assessment:** Animal age, measures to prevent wildlife incursion, presence of domestic animals in the field, cross-contamination from workers who handle animals or are in animal areas and then work with produce, rotation of crop land with grazing land, pre-harvest assessments	
Adjacent Land Runoff **Risk:** Water runoff and wind erosion leading to contamination **Risk Assessment:** Slope of the land, buffers and/or barriers to reduce water and wind movement	
Raw Manure **Risk:** Raw manure contains pathogens which must be treated or allowed time to die off **Risk Assessment:** Application timing two weeks prior to planting, 120 days before harvest	
Soil Amendments **Risk:** Soil amendments can add potential sources of contamination to the cropping system **Risk Assessment:** Raw manure, composted manure, aged manure, materials brought in from other sources, type of treatment to reduce pathogens, products of animal origin (fish emulsion)	
Harvest Containers **Risk:** Cross-contamination from containers with soil or previously harvested materials **Risk Assessment:** Cleaning and sanitation steps between container uses, new/reusable/single use container practices, covering produce when transporting goods in containers, storage of containers when not in use, access of wild and domestic animals to stored containers	

Production Practice	Mitigation Strategy
Harvest Equipment **Risk:** Presence of pathogens if not cleaned and sanitized regularly **Risk Assessment:** Regularity of cleaning, correct cleaning and sanitizing steps used, sanitizers used according to label, treatment/ maintenance/ cleaning/sanitizing hand tools as well as machinery	
Potable Wash Water **Risk:** Pathogens introduced through wash water **Risk Assessment:** Water testing, sanitizing water to reduce cross-contamination when using the same water to wash large quantities	
Transportation Vehicle **Risk:** Contamination from the condition of a vehicle **Risk Assessment:** Other uses for the vehicle, other loads that have been carried, cleaning and/or sanitizing when necessary	
Facility Food Contact Surfaces **Risk:** Introducing pathogens onto a surface that then contacts produce **Risk Assessment:** Frequency and procedure for cleaning and sanitizing protocols, debris or droppings above contact surfaces, animal access to contact surfaces	
Pest Control Program **Risk:** Facilities harboring excessive rodents and/or insects that carry pathogens **Risk Assessment:** Trapping programs inside and outside the facility, monitoring presence of pests, holes and cracks in facility structures	
Restrooms and Hand Washing Signage **Risk:** Worker hygiene can be a source of contamination **Risk Assessment:** Worker hygiene training, location of hand- washing station, cleaning and maintenance, keeping bathroom and hand- washing station stocked, visible and clearly understood signs about hygiene	
Segregated Break Areas **Risk:** Interaction of saliva with workers hands which is not addressed before returning to work **Risk Assessment:** Tobacco product use, chewing tobacco, gum, designated break areas	
Worker Illness and Injury **Risk:** Passing pathogens from sick worker to food **Risk Assessment:** Nausea, vomiting, diarrhea, fever, jaundice, conditions to return to work, method of reporting illness to supervisor, first- aid kit availability, covering wounds appropriately	
Worker Apron and Glove Use **Risk:** Use of protective clothing without a cleaning schedule can lead to cross-contamination **Risk Assessment:** How are aprons and gloves used, frequency of cleaning, single vs. multiple use	

Digging Deeper: Growing for Schools

Bringing the Farm to School Case Studies

- http://www.farmtoschool.org/bringingf2s-casestudies
- Podcasts:
  - — Selling Beef to Schools Podcast – A profile of Bear Paw Meats (Karla Buck, Bear Paw Meats, Montana)
  - — Is Farm to School Right for You: A conversation with Katrina Becker from Cattail Farm (Athens, Wisconsin)
  - — Leveraging Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm, New Mexico)
- Videos:
  - — Working with Schools to Meet Food Safety Expectations without GAP Certification (Common Ground Farm, Wappingers Falls, New York)
  - — Season Extension and Crop Planning for School Sales (Living Root Farm; Hardin, Montana)

Enterprise Analysis Tools offer a deeper dive into enterprise cost and return analysis for school markets. This topic is one of the more important considerations for producers who are considering selling to schools. It also will take time for some producers to work through a full enterprise budget. As producers develop their action plans moving forward, this should be on the list. Below are some resources for farmers. You can also utilize project-partner technical assistance.

- Online course: Fearless Farm Financing - Online Course. Midwest Organic and Sustainable Education Service.
- Calendar tool: The Carrot Project Farm Financial Calendar Tool. Made available at the New Entry Sustainable Farming Project.
- Excel template and guide: Evaluating Marketing Outlets Using Whole-Farm Records. Iowa State University.
- Online spreadsheet: Livestock Marketing Channel Assessment Tool. Cornell University.
- Cost calculator: Distribution Cost Calculator. OK FTS Program.

Scaling Up:

- ATTRA Tutorials:
  https://attra.ncat.org/tutorials
  - — Scaling Up for Regional Markets
  - — Intermediated Markets
- Publications:
  - — Scaling Up your Vegetable Farm for Regional Markets
  - — Wholesale Success by Family Farmed

Insurance:

- Noninsured Crop Disaster Assistance Program and Whole-Farm Revenue Protection: Understanding the Differences https://attra.ncat.org/product/noninsured-crop-disaster-assistance-program-and-whole-farm-revenue-protection-understanding-the-differences
- Food Liability and Insurance Program, https://www.fliprogram.com
- Farm Commons, https://farmcommons.org
  - — *There are a lot of resources on the Farm Commons website on labor, insurance, sales, and contracts.*

Production Planning:

Crops

- Webinars:
  - — Crop Planning for Vegetable Farmers, https://attra.ncat.org/crop-planning-for-vegetable-farmers
- Planning Templates:
  - — Crop Planning for Vegetable Growers, COG templates, https://cog-shop.myshopify.com/products/crop-planning-for-vegetable-growers
  - — Veggie Compass, http://www.veggiecompass.com
- Online Guides:
  - — Estimating Crop Yields; A Brief Guide, http://agriculture.vic.gov.au/agriculture/grains-and-other-crops/crop-production/estimating-crop-yields-a-brief-guide
  - — Johnny's Seed Calculator
- ATTRA Podcast:
  - — Crop Planning 101, https://attra.ncat.org/crop-planning-101-podcast

Meat:

- Working with Your Meat Processor Podcast, https://attra.ncat.org/working-with-your-meat-processor
- Working with Your Meat Processor Publication, https://attra.ncat.org/attra-pub-summaries/?pub=567
- Procuring Local Meat, Poultry, Game, and Eggs for Child Nutrition Programs
- Local Meat in Schools - Increasing Opportunities for Small and Mid-Sized Livestock Ranchers and Fishermen
- Livestock Compass
- States Operating Their Own MPI Programs
- Meat, Poultry and Egg Product Inspection Directory
- Niche Meat Processor Assistance Network

Navigating School Food Safety Standards

- Tutorial:
  - ATTRA Produce Safety Tutorial
- Videos:
  - Farm-Based Food Safety videos
- Toolkit:
  - Farmer Regulatory Toolkit Understanding Food Safety Regulations and Performing a Self Assessment
- Publications:
  - Farm to School Legal Toolkit, https://www.commongroundfarm.org/assets/Common-Ground-Farm-Farm-to-School-Legal-Toolkit.pdf
  - National Young Farmers Coalition. 2020. A Small Farmer's Practical Guide to Food Safety. 2020. https://www.youngfarmers.org/resource/foodsafetyguide
  - Tips, Tools, and Guidelines for Food Distribution and Safety, Oklahoma Farm to School
- Online resource:
  - The Seven Principles of HACCP, University of Nebraska—Lincoln

CONCLUSION: PLANNING FOR ACTION

Now that you have an idea of how your farm products can fit into a Child Nutrition Program, how to approach schools for direct sales, and how to plan your production for efficient and sustained sales, it is time to review what you have learned and the actions that will set you up for success in selling to schools.

- Download Conclusion: Planning for Action Slide Deck here

This is the end of this training but only the beginning for you and your journey into school sales! Take a minute to review the checklists in your School Business Action Planning Guide, as well as your short-term goals and strategies for moving forward with selling to schools.

AGRICULTURAL PRODUCERS' TOOLKIT
Bringing the Farm to School

— School Business Action Planning Guide —

This guide is intended to be used in conjunction with your Farm to School Producer Workbook. After each module, your trainer will prompt you to check in about what you learned and where you need to "dig deeper." The action planning prompts below will help you identify your short-term and long-term strategies for moving forward with selling to schools.

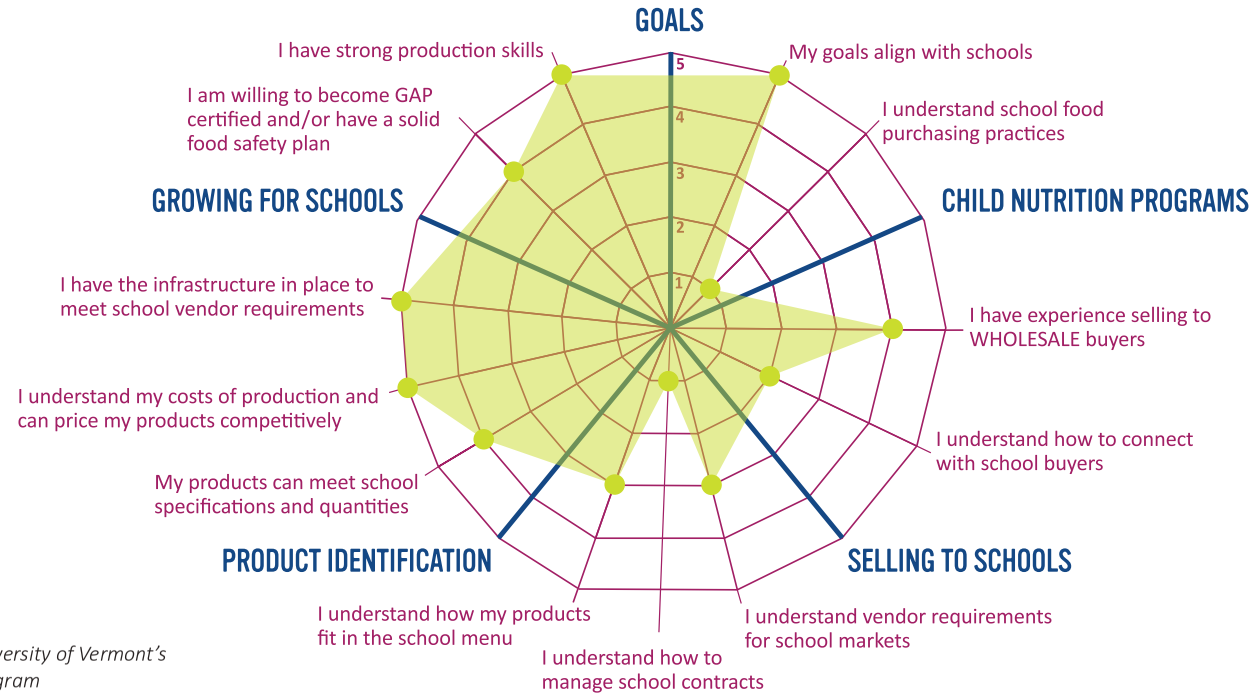
Farm to School Skills and Resources

First let's look at how your knowledge, skills and resources align. The University of Vermont's Beginning Farmer Program sees the skills and resources needed to get started in farming as overlapping, reinforcing, and interconnected – more like a web than a checklist. Our team has adapted this web for farmers interested in selling to schools, as shown in Figure 1.

Each category in the School Business Assessment is arranged by the learning objectives for each module of the training program. Figure 1 shows a farm business assessment that was completed by a farm that:

- Has a mission and whole-farm goals that align with school sales
- Has strong production and financial management skills and food safety protocols in place
- Is familiar with selling through wholesalers
- Is not familiar with procurement and what it takes to be a vendor for schools

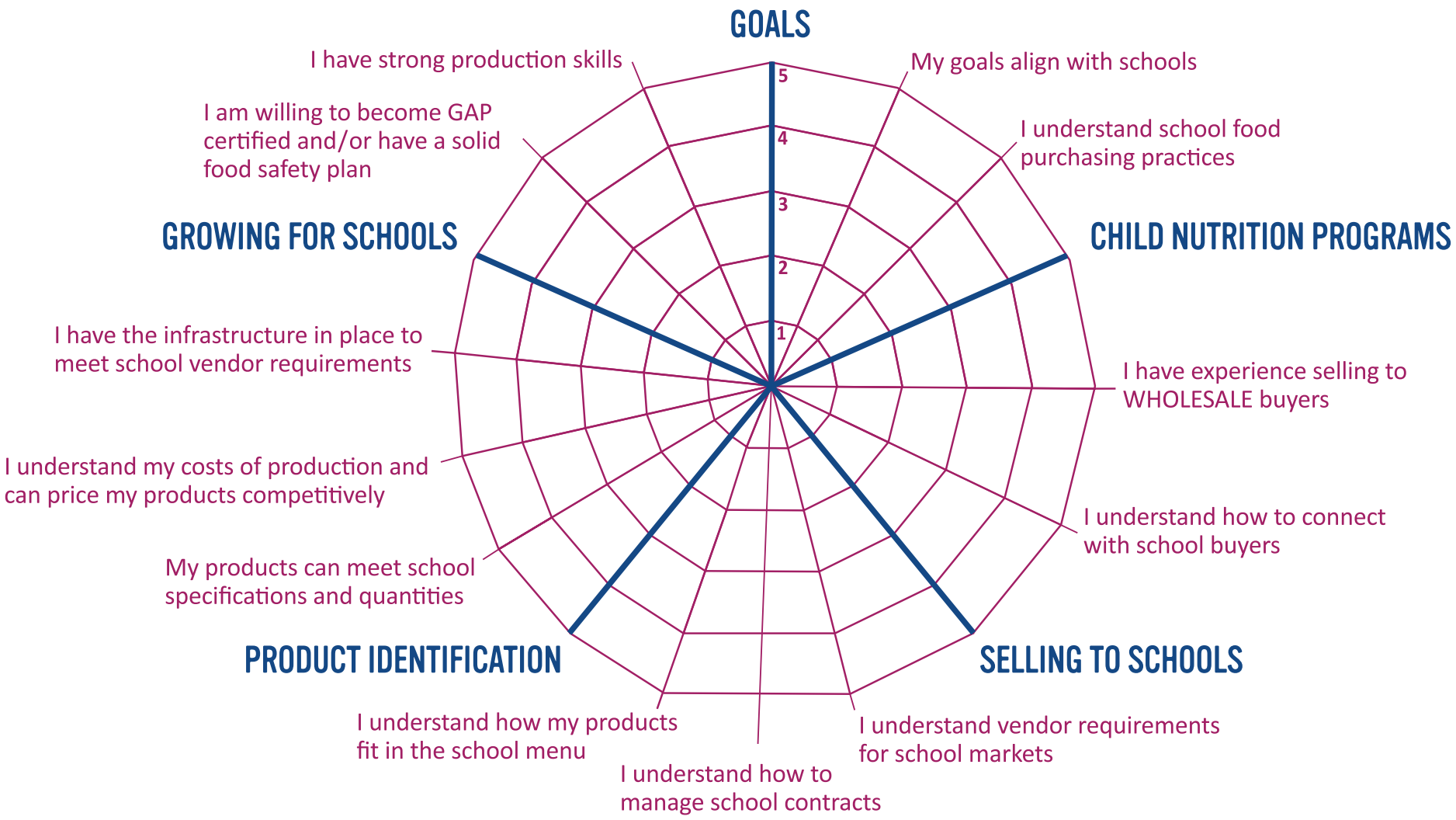
Figure 1. Sample School Business Assessment



Adapted from the University of Vermont's Beginning Farmer Program

Score yourself on a scale of 1-5 with "1" indicating little to no skills or resources and "5" indicating very strong skills and ample resources.

Figure 2. School Business Assessment



Adapted from Brumfield, Robin, G. January 2005. To Market, To Market: A Workbook for Selecting Market Options and Strategies for Agricultural Products.Rutgers Cooperative Research and Extension, New Jersey Agricultural Experiment Station, New Brunswick.

Now that you have an idea of what skills and resources you can apply when selling to schools, let's see how your goals align.

Benefits of farm to school that interest you (check all that apply):

- ☐ Expanding into a new market (i.e., schools)
- ☐ Expanding product offerings
- ☐ Increasing quantity and/or frequency of sales
- ☐ Diversifying market strategy (e.g., marketing to students and families by hosting farm visits or barn-raisers)
- ☐ Growing your brand by building relationships with school communities
- ☐ Nourishing kids with healthy, fresh food
- ☐ Other:
- ☐ Increasing access to fresh and local foods in your community
- ☐ Increasing agriculture and nutrition educational opportunities for students
- ☐ Promoting farming as a career path and lifestyle choice for youth in your community
- ☐ Increasing the visibility of small- and medium-sized family farms
- ☐ Managing risk (e.g., through market diversification and consistent sales)

How do your motivations for selling to schools align with your farm goals?

What does success look like for each of your farm to school-related farm goals?

What information do you need to achieve these goals?

Who can help you accomplish these goals? (e.g., farm to school trainer, business partner, school food service relationship, etc.)

What materials and resources do you need to achieve these goals? (e.g., capital, infrastructure, labor, transportation network, etc.)

School Business Action Plan: End-of-Module Check-In's

This action plan is where you will outline your short-term strategies to move forward with school sales. After each module, you will be prompted by your trainer to assess your knowledge gaps for that module using the check-in questions below. After assessing your gaps, proceed to fill in the action plan by identifying your short-term strategies and next steps.

Considerations for producers when developing a School Business Action Plan:

- Motivations to participate in or expand school markets (values and goals)
- Short-term and long-term goals for farm to school sales
- Break-even point needed to cover expenses and earn a profit
- Value producers can provide schools
- Action steps for the next six to12 months following the training
- Resources, contacts, and any additional information needed to implement the plan

Module 1: Getting to Know School Markets

- ☐ I understand the diversity of product needs for Child Nutrition Programs.
- ☐ I understand how Child Nutrition Programs develop menus as well as process and prepare local foods.
- ☐ I know what types of local products schools typically want to purchase.
- ☐ I understand the basics of how school districts source and procure local foods for school meal programs.

Module 2: Selling to School Markets

- ☐ I understand the market channel options—direct, intermediate, and wholesale distributors—for selling to schools.
- ☐ I know the basics of working with intermediated and national wholesale distributors.
- ☐ I know how to find and respond to school solicitations.
- ☐ I know who to communicate with at the school district.
- ☐ I understand common school purchasing practices, quality standards, and vendor requirements.
- ☐ I understand how schools expect to receive local products (i.e., order and delivery process, quality management, and post-harvest handling practices).

Module 3: Product Development for School Markets

- ☐ I understand how my products can fit into school meal menus.
- ☐ I understand how my products could be processed to meet school demand.
- ☐ I understand the tools I can use to price my products for school sales.

Module 4: Growing for School Markets

- ☐ I understand the "break-even" price point I need for my products to enter or expand into school sales.
- ☐ I understand the weak links to consider before scaling up my farm (e.g., infrastructure, food safety, distribution, etc.).
- ☐ I have the beginning of a production plan for my product(s).
- ☐ I understand and can communicate my food safety practices to School Food Authorities.

Using the School Business Action Plan Table below, outline the **short-term strategies**, **action steps**, and **corresponding timeline** needed to address the knowledge gaps you identified after each module. Remember to apply SMART goals to your action plan.

Table 1. School Business Action Plan

Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions—who's responsible, important dates, benchmarks, etc.)
Module 1: Getting to Know School Markets Including, but not limited to: • Knowledge of the school districts in my region that serve local food • Alignment of current production and infrastructure with school market needs			

Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions—who's responsible, important dates, benchmarks, etc.)
Module 2: Selling to School Markets Including, but not limited to: • Market channel choice (direct, intermediate, or national wholesale distributor) • Identifying and responding to school solicitations • Communicating with school districts • School purchasing practices, quality standards, and vendor requirements • Meeting school expectations (e.g., order and delivery process, quality management, and post-harvest handling practices)			

Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions—who's responsible, important dates, benchmarks, etc.)
Module 3: Product Development for School Markets Including, but not limited to: • Choosing products to sell to schools • Product processing needs • Break-even price points for products being sold to schools			

Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions—who's responsible, important dates, benchmarks, etc.)
Module 4: Growing for Schools Including, but not limited to: • Break-even price points for school sales • Weak links in farm/business • Product production plan • Food safety			

Resource NEEDS and tools for SUPPORT (information, purchases, tools, people, resources identified in this training, partners, funding, etc.)

Bringing the Farm to School Action Plan Conclusion: Tying it All Together

Farm to School **MARKET CHANNEL**	**VALUES PITCH**	**KEY RESOURCES** you need to enter or expand into chosen market channel	**KEY NEXT STEPS** to move forward with school sales	**KEY PRODUCTS** to sell to school buyers and their **BREAK-EVEN POINTS**	**KEY PARTNERS** and team members that will help you achieve your goals
Local school: Intermediated (e.g., food hub): National wholesale distributor: *For example, Durango School District; Western Montana Growers Cooperative; Food Services of America.*	*What makes your product different or unique? Why should schools be interested in purchasing from you?*	*What information, tools, resources identified in this training, funding, etc. do you need?*			*For example, business partners, Farm Service Agency officers, USDA Regional Farm to School Lead, Cooperative Extension Agent, State agency representative, etc*

APPENDIX B: GLOSSARY OF KEY TERMS

Action Plan: A detailed plan outlining actions needed to achieve one or more goals.

Aggregator: A business that brings products together from many sources. The verb "to aggregate" means to form into a group. Food hubs and broadline distributors are aggregators of food products, which they later distribute.

Agriculture Improvement Act of 2018 – Section 4207: Specifies that in order to be compliant with the Buy American requirements, agricultural commodities and the products of agricultural commodities shall be processed in the United States and substantially contain meats, vegetables, fruits, fish, and other agricultural commodities produced in the United States or any territory in possession of the United States. The Act provides clarification on the treatment of harvested fish under the Buy American requirements. Learn more here.

Break-even Price: The minimum price needed for a given agricultural product, at which the total cost to produce is equal to the total revenue.

Broadline Distributor: A distributor that aims to provide as many products as possible to as many customers as possible. They achieve this by becoming experts at logistics and supply-chain management. They are usually regional or national in scale. Also sometimes referred to as a "prime vendor."

Buy American Provision: Requires school food authorities to purchase, to the maximum extent practicable, domestic commodities or products. This provision supports the mission of Child Nutrition Programs, which is to serve children nutritious meals and support American agriculture.

Child Nutrition Programs (CNPs): Federally funded programs administered through the United States Department of Agriculture Food and Nutrition Service (USDA FNS) that help ensure children are receiving nutritious meals and snacks that promote health and educational readiness.

Child Nutrition Program Director/School Nutrition Director: The individual responsible for planning, administering, implementing, monitoring, and evaluating all district-wide aspects of a Child Nutrition Program. These positions are at the district level and are often referred to as Food Service Director.

Child Nutrition Program (CNP) Operators: School nutrition professionals that manage and run Child Nutrition Programs. These are food service staff working at the local level (school kitchens, central production kitchens), e.g., kitchen managers, production staff, assistants.

Collective Purchasing: Utilized when school districts participate in State and Regional Purchasing Cooperatives and Buying Groups in order to help school districts obtain greater buying power and lower prices than they would when buying on their own.

Contract: Written agreement between a buyer and a seller in which the buyer agrees to purchase goods or/and services from the seller in exchange for payment transactions.

Distributor: A business that supplies goods to other businesses that connect with an end-consumer. A large food-services company distributes food products to many different schools and institutions.

Enterprise Budget: A listing of all estimated income and expenses associated with a specific enterprise, to provide an estimate of its profitability. A budget can be developed for each existing or potential enterprise in a farm or ranch plan.

Farm to School: Farm to school implementation differs by location but always includes one or more of the following:

- Procurement: when local or regional foods are purchased, promoted, and served in the cafeteria or as a snack or taste-test;
- Education: Students participate in education activities related to agriculture, food, health, or nutrition; and
- School gardens: Students engage in hands-on learning through gardening.

Federal Procurement Regulations: An established set of procurement standards found in the program and government-wide regulations that govern how Child Nutrition Programs source and purchase goods and services.

Food Broker: An independent business that brokers sales between a farmer/producer and an intermediary buyer, usually a distributor or retailer. Brokers can also serve a role between a buyer and an intermediary, e.g., between the distributor and a school.

Food Hub: A business (often nonprofit) that aggregates and distributes food products at a local or regional scale.

Food Safety Plan: An outline of the steps a farm can take to make sure its products are as safe as possible. This includes any documentation of practices and certification.

Food Supply Chain: The set of trading-partner relationships and transactions that deliver a food product from producers to consumers.

Food Service Management Company (FSMC): A commercial enterprise or a nonprofit organization that acts on behalf of a School Food Authority (SFA) by managing or directing any aspect of the school meal program(s). Must meet applicable program requirements.

Food Safety Modernization Act (FSMA): A series of seven rules administered by the U.S. Food and Drug Administration that are designed to put forth clear, specific guidelines to prevent contamination in the global supply chain.

Good Agriculture Practices (GAP): A voluntary audit that verifies that fruits and vegetables are produced, packed, handled, and stored as safely as possible to minimize risks of microbial food safety hazards.

Hazard Analysis Critical Control Point (HACCP): A management system in which food safety is addressed through the analysis and control of biological, chemical, and physical hazards from raw material production, procurement, and handling, to manufacturing, distribution, and consumption of the finished product.

Healthy Hunger-Free Kids Act – Section 243: Also known as the "Access to Local Foods: Farm to School Program" provision, this section establishes the USDA Farm to School Program, including grants, technical assistance, and research and data collection and dissemination that supports schools in implementing farm to school and improving access to local foods. Learn more here.

Intermediary: A "middle" person or entity that buys product from local producers and then markets the products to school districts, coordinates logistics, and ultimately completes the sale.

Market Channel: The path goods take from the producer to the end-consumer.

Perishable Agricultural Commodities Act (PACA) Licensing: All food business operators must have a Perishable Agricultural Commodities Act (PACA) license; it is proof to customers and suppliers that the business can be trusted to honor the terms of their contracts and that they are abiding by fair trading practices established by the PACA.

Post-Harvest Handling Practices: The stage of crop production immediately following harvest; includes harvesting, precooling, cleaning and disinfecting, sorting and grading, packaging, transportation, and storage.

Price Point: The price that is chosen for a product, usually when there are several different prices to choose from.

Procurement: The act of purchasing goods and services (e.g,. food for Child Nutrition Programs).

Product Traceability System: Traceability is a system in which fruits and vegetables can be tracked from the field to the buyer, by lot, through unique codes.

School Food Authority: The governing body responsible for the administration of nutrition programs for one or more schools and with the legal authority to operate the nutrition program therein or otherwise approved to operate the National School Lunch Program by Food and Nutrition Service.

School Markets: The market pathway in which Child Nutrition Programs are the end-consumer.

School Nutrition Directors: District-level professionals who oversee all aspects of the school nutrition program for the district, independently or alongside additional school nutrition professionals. They are directly responsible for the management of the day-to-day operations of school foodservice in a district.

Solicitation: The process of seeking information and price quotations, bids, or proposals from qualified vendors/suppliers for goods and services as specified by Child Nutrition Program operators.

Specification: A precise description of the physical characteristics, quality, or desired outcomes of a commodity to be procured, which a supplier must be able to produce or deliver to be considered for award of a contract.

State Administering Agency: The state agency responsible for administration of Child Nutrition Programs. State agencies that administer Child Nutrition Programs vary, and may include departments of education, health, or sometimes agriculture.

Value-added: A change in the physical state or form of the product (such as milling wheat into flour or making strawberries into jam). The production of a product in a manner that enhances its value, as demonstrated through a business plan (such as organically produced products).

Value Supply Chain: Strategic alliances between farmers or ranchers and other supply-chain partners that deal in significant volumes of high-quality, differentiated food products and distribute rewards equitably across the chain.

Vendor: A supplier of goods or services.

Wholesaler: An entity that may aggregate, process, and/or manufacture products to then sell to an additional distribution partner who then markets to SFAs and distributes the products to the school district or individual school site.

Whole-Farm Goal Setting: Distinct from other farm planning approaches because it ties together all of the planning producers do for the *whole* farm. This holistic approach is based on the short- and long-term vision producers and their families have for themselves and the farm.

Commonly Used Acronyms

AMS	Agricultural Marketing Service
ATTRA	Appropriate Technology Transfer for Rural Areas
CACFP	Child and Adult Care Food Program
CAFF	Community Alliance with Family Farmers
CNP	Child Nutrition Program
FFVP	Fresh Fruit and Vegetable Program
FNS	Food and Nutrition Service
FSA	Farm Service Agency
FSD	Foodservice Director
FSMA	Food Safety Modernization Act
FVC	Farmer Veteran Coalition
GAP	Good Agricultural Practices
HACCP	Hazard Analysis Critical Control Point
IAC	Intertribal Agriculture Council
MARO	Mid-Atlantic Regional Office (USDA-FNS-OCFS regions)
MPRO	Mountain Plains Regional Office (USDA-FNS-OCFS regions)
MWRO	Mid-West Regional Office (USDA-FNS-OCFS regions)
NCAT	National Center for Appropriate Technology
NERO	Northeast Regional Office (USDA-FNS-OCFS regions)
NESAWG	Northeast Sustainable Agriculture Working Group
NFSN	National Farm to School Network
NFUF	National Farmers Union Foundation
NIFA	National Institute of Food and Agriculture
NSLP	National School Lunch Program
NYFC	National Young Farmers Coalition
OCFS	Office of Community Food Systems
RD	Rural Development
SBP	School Breakfast Program
SERO	Southeast Regional Office (USDA-FNS-OCFS regions)
SFA	School Food Authority
SFSP	Summer Food Service Program
SSAWG	Southern Sustainable Agriculture Working Group
SWRO	Southwest Regional Office (USDA-FNS-OCFS regions)
USDA	United States Department of Agriculture
WRO	Western Regional Office (USDA-FNS-OCFS regions)

APPENDIX C: SOLICITATION PACKET

This packet will help you understand the solicitation process. It includes a sample solicitation, as well as links to other local-food solicitations to review. After reviewing the solicitations, you can use the worksheets to help guide you through the solicitation and bidding process.

1. Enclosed sample solicitation
    a. Durango Public Schools
        i. Invitation for Bid SY 2020-2021
        ii. Farm to School Beef Bid SY 2020-2021
        iii. Farm to School Checklist for Producers and Local K-12 Schools

2. Additional solicitations
    a. Minneapolis Public Schools
        i. MPS Farm to School Fresh Produce RFP #: F2S 2020
        ii. Farm to School Toolkit (2016)
    b. Albuquerque Public Schools
        i. New Mexico Produce Growers Bid #21-004MS
        ii. Price List

3. Worksheet 2B: School Market Readiness Evaluation
4. Worksheet 2C: School Solicitation Worksheet
5. Worksheet 2D: School Nutrition Director Meeting Checklist

Durango School District 9-R
Student Nutrition Services
Krista Garand – Coordinator of Student Nutrition
Durango High School
2390 Main Avenue
Durango CO 81301

Invitation for Bid

BID #2021

Bid Response Due: 2:00 P.M. March 23, 2020

Purpose of Bid

School districts in the southwest are working together to source more locally grown foods into our school breakfast and lunch programs.

Table of Contents

Durango School District 9-R Student Nutrition Services
Invitation For Bid #2020

I. INSTRUCTIONS TO VENDORS

A. INVITATION FOR BID

1. Sealed bids will be received at Durango School District 9-R on March 23, 2020 by 2:00 P.M. for the furnishing and delivery of locally grown fresh fruits and raw vegetables to participating School Districts.

2. Delivery locations specified within Addendum C of the bid.

3. This will be in accordance with the terms and conditions established within this bid.

4. **Bids received after the time specified in Section I.A.1 will not be opened or considered.**

5. The vendor assumes all risk of any delay in the mail or on the handling of mail by employees of the district.

6. The vendor assumes responsibility for having the bid in on time.

7. Telephone amendments, faxed bids and emailed bids will not be accepted.

8. For the purpose of this bid, locally grown fresh fruits and raw vegetables are defined as "unprocessed agricultural product that retains its inherent character" and originates from within a 250 mile radius of Durango, Colorado.

9. All "locally grown" products will be harvested within one week of delivery and local products meeting these requirements must be documented in the awarded respondents subsequent purchase orders and invoicing.

B. PREPARATION OF BID DOCUMENTS

1. All documents must be typewritten or printed in ink.

2. All bids must be addressed and mailed to the Durango School District 9-R, Student Nutrition Services Department, 2390 Main Avenue, Durango, CO 81301.

3. Bid pricing should be submitted in two parts: raw food cost and delivery cost. Delivered pack sizes must be included.

4. An agent authorized to enter into an agreement must sign bid.

C. WITHDRAWAL OF VENDORS

1. Bids may be withdrawn with written notice from agent who signed the original document after the document has been opened.

2. Once submitted, documents become the property of the Durango School District.

3. When documents are opened, they become public information and any restrictions put upon the district regarding the sharing of information or duplicating copies after opening will be grounds to reject the Bid.

D. INQUIRIES REGARDING PROPOSAL

1. All inquiries concerning this Bid must be submitted in writing to the attention of: Krista Garand, Student Nutrition Services Department, 2390 Main Avenue, Durango, CO 81301.

2. Responses that include interpretations, classifications, modifications, and supplemental instructions in the form of written addendum will be provided to all Vendors on record in the Student Nutrition Services Department.

3. Inquiries and questions must be submitted by March 9, 2020 at 10 A.M.

4. Inquiries and questions will be answered March 13, 2020, and posted on the Durango School District 9-R Web site.

5. The District will not be responsible for, nor honor any claims resulting from, or alleged to be the result of misunderstanding by the Vendor.

6. No phone or in person inquiries will be accepted.

7. It is the Vendor's responsibility to bring all discrepancies, ambiguities, omissions, or matters that need clarification to the District's attention.

E. PRE-BID CONFERENCE

1. No Pre-bid conference will be held for the 2020-2021 season.

F. AWARD

1. A vendor may be disqualified based on failure to meet any of the criteria listed in Section I.F.3.a-e.
2. Site visits and pre-award audits may be done prior to the award.
3. Award shall be based on, but not limited to the following:
   a) *Proposed Pricing: three lowest bidders will be considered.*
   b) *Vendor Performance: The general reputation and experience of the vendor in the industry. The District's knowledge and/or experience of the Vendor's past performance, including quality of merchandise offered.*
   c) *Delivery: Vendor's ability to meet delivery and stocking requirements.*
   d) *Financial responsibility of the Vendor.*
   e) *Ability to meet requirements of the bid, including self-assessment and food safety plan.*

G. RIGHT TO AWARD TO MORE THAN ONE VENDOR

1. Right is reserved to award this bid in whole to a single supplier or multiple suppliers or to reject any or all Proposals if it is in the best interest of the Districts to do so.
2. District School Boards reserve the right to reject any or all Bids or parts of Bids and to waive informalities in the proposals.
3. Estimates provided on attached sheets are based on historical purchasing history and are not a guarantee of purchase.

H. POINT SYSTEM USED IN DETERMING AWARD OF BID

1. Preference Points (pp) awarded after three lowest bidders are identified are as follows:
   a) 10 preference points (pp) if the bidder meets the geographic preference defined in Section I.A.8.
   b) Each pp equals one cent. 10 pp equal 10 pp cents.
   c) A total of 10 pp cents can be taken into consideration in determining award of the bid.
   d) The preference points and cents only apply to determining the winning bidder and do not affect purchase price.
   e) The preference points are used to determine applicability of geographic preference to pricing and do not preclude any vendor outside the geographical preference from bidding.

II. GENERAL SPECIFICATIONS

A. CONTRACT PERIOD

1. This contract period is from August 3, 2020-June 4, 2021.

B. CONTRACT PRICING

1. The price per unit must remain firm for the full contract period. Pack sizes must be included with pricing.

C. CONTRACT CANCELLATION

1. Unless otherwise stated, any contract entered into as a result of the bid may be canceled by either party upon 30 day written notice to the effective date of cancellation. Cancellation may be in whole or part.

D. VENDOR PERFORMANCE

1. If the vendor is unable to perform under the terms of the contract, the Districts reserve the right to cancel this contract.

E. DELIVERY GUARANTEE

1. Vendor must notify Districts in advance of delivery, if unable to deliver items ordered. 14-day advance notice is required.

F. DELIVERY INSTRUCTIONS

1. The prices quoted shall be for delivery to the locations specified in delivery locations document.
2. Delivery shall be on an as-needed basis.
3. All deliveries must have a Purchase Order that clearly identifies the farm(s), product, quantity, and pack sizes.
4. At receipt of delivery, product is to be inspected for acceptable quality and quantities verified against the purchase order.
5. Districts reserve the right to refuse product due to unacceptable quality.
6. Any delivery discrepancies are to be noted on the delivery invoice.
7. Districts require Monday deliveries.
8. Districts require the ability to email orders directly to vendors.
9. Districts prefer boxes with lids.
10. Delivery boxes must be labeled clearly with the name of the farm, name(s) of enclosed item(s), quantity of each item, date of harvest for each item, and delivery date.
    a) *Districts reserve the right to refuse any product that is not delivered in acceptable packaging.*

11. All deliveries to the Durango receiving center will follow the Durango 9-R Aggregation Facility for Farm to School Produce Policy and Procedure for Vendor Delivery and Receiving Guide. Farmers may request a copy from the Durango School District 9-R Student Nutrition Services Department.

G. INSURANCE

1. Vendors must provide evidence of liability insurance.

H. PAYMENT TERMS

1. Payment terms will be defined by individual school districts involved within the bid. “Date of receipt” means the completed delivery of the goods or the receipt of the invoice for the delivery of the goods or services, whichever is later.

I. COMPLIANCE WITH LAWS

1. All items must comply with applicable local, state and federal laws pertaining thereof.

J. FOOD SAFETY

1. All vendors must have an on-farm Food Safety Plan in place and provide documentation of said procedures as part of their Bid response.

2. If awarded , producers agree to allow District staff to schedule farm visits to observe agricultural and food safety practices at mutually agreed upon times throughout the contract period.

ADDENDUM A

ACCEPTANCE

1) The Vendor agrees to comply with all Federal, State and local laws, ordinances, and all applicable rules, regulations, and standards.

2) Participating Districts are tax-exempt. Exemptions forms will be issued upon request.

3) The Vendor Certifies that this Proposal is made without prior understanding, agreement, or connection with any corporations, firm or person submitting a Proposal for the same materials, supplies, or equipment and is, in all respects, fair and without collusion or fraud. The vendor understands that collusive bidding is a violation of Federal law and can result in fines, prison sentences, and civil damage awards. The Vendor further agrees to abide by all conditions of this Proposal.

SIGNED: _____

PRINTED NAME: _____

VENDOR NAME: _____

ADDRESS: _____

BUSINESS PHONE: _____

BUSINESS EMAIL: _____

The following documents must be submitted for a complete Bid package:	
	Proof of liability insurance
	Signed Acceptance [Addendum A]
	Variations, if applicable [Addendum B]
	Food Safety Checklist [Addendum E]
	Food Safety Plan with Signature and Date [Addendum F]
	Response Forms: Pricing and Estimated Availability of Products [Addendums H - L]

ADDENDUM B

Variations:

The bidder shall identify all variations and exceptions in the space provided below provided, however, that such variations are not expressly prohibited in the Bid documents. For each variation listed, reference the applicable section of the bid document. If no variations are listed here, it is understood that the Bidder's Proposal fully complies with all terms and conditions. It is further understood that such variations may be cause for determining that the Bid Proposal is non-responsive and ineligible for award. Examples of variations may include, but are not limited to, pack sizes and products not listed in the product list and usage page that a Vendor would like to be considered.

Section_____

Variance_____

_____

Section_____

Variance_____

_____

Section_____

Variance_____

_____

Section_____

Variance_____

_____

Section_____

Variance_____

_____

If necessary, you may attach additional sheets.

ADDENDUM C

DELIVERY LOCATIONS:

Durango School District 9-R
Durango High School
2390 Main Avenue
Durango, CO 81301
Contact: Krista Garand – Coordinator of Student Nutrition
kgarand@durangoschools.org
(970) 259-1630, ext. 2042

Bayfield School District
800 County Rd 501
Bayfield, CO 81122
Contact: Julie Whitmore – Director of Nutrition Services
jwhitmore@bayfield.k12.co.us
(970) 884-9521, ext. 2009

Ignacio School District 11-JT
315 Becker Street
Ignacio, CO 81137
Contact: Kim Cotta – Food Service Director
kcotta@ignacioschools.org
(970) 563-0653

Mancos School District Re-6
395 Grand Avenue
Mancos, CO 81328
Contact: Janet Fogel – Food Services Director
jfogel@mancosre6.edu
(970) 533-7748

Montezuma-Cortez School District Re-1
2003 Industrial Park Road
Cortez, CO 81321
Contact: Sandi Vanhoutean – Director of Nutrition Services
svanhoutean@cortezk12.co.us
(970) 565-7522, ext 1145

Telluride School District R-1
725 W Colorado
Telluride, CO 81435
Contact: Wendy Everett – Director of Finance/Food Service
weverett@telluride school.org
(970) 369-1218

ADDENDUM D

DURANGO PRODUCE LIST

VEGETABLES	PACK SIZE	MINIMUM DELIVERY
Arugula		
Broccoli	20 LBS	20 LBS
Carrots	25 LBS	1 Case
Cauliflower	20 LBS	20 LBS
Celery	5 LBS	
Corn, Ears	50 Ct	
Cherry Tomato	Pint	6 Pints
Cucumbers	5 LBS	1 Case / 5 LBS
Grape Tomato	Pint	6 Pints
Green Beans	10 LBS	
Green Chilies	5 LBS	
Jalapenos	5 LBS	
Lettuce, Mix	1 LB	20 LBS
Lettuce, Romaine, Whole	12 – 24 Each	12 – 24 Each
Pepper, Green	5 LBS	1 Case / 5 LBS
Pepper, Red	5 LBS	1 Case / 5 LBS
Potato, Red	25 LBS	2 Cases
Potato, Russet	25 LBS	2 Cases
Potato, White	25 LBS	2 Cases
Potato, Yellow	25 LBS	2 Cases
Radish	1 LB	10 LBS
Spinach	2.5 LBS	
Squash, Yellow	20 LBS	
Tomato	10 LBS	10 LBS
Zucchini	20 LBS	

FRUITS	PACK SIZE	MINIMUM DELIVERY
Apples, Fuji	1/2 Bushel or 40 LBS	5 Cases
Apples, Gala	1/2 Bushel or 40 LBS	5 Cases
Apples, Granny Smith	1/2 Bushel or 40 LBS	5 Cases
Apples, Jonathan	1/2 Bushel or 40 LBS	5 Cases
Melon, Variety	6 – 8 Count	1 Case
Cantaloupe	6 – 8 Count	1 Case
Watermelon	Each	10 Each
Pears	22 – 26 LBS	10 Cases
Peaches	22 – 26 LBS	10 Cases
Plums	22 – 26 LBS	
Strawberries	PINT	

HERBS	PACK SIZE	MINIMUM DELIVERY
Cilantro	1 LB	1 LB
Basil	4 oz.	1 LB
Thyme	4 oz.	1 LB

SPECIALTY MEAL: THANKSGIVING – DURANGO ONLY

Delivery: First Week of November

ITEM	QUANTITY	PACK SIZE
Beets	150 LBS	15 LBS
Carrots	500 LBS	25 LBS
Onions	100 LBS	10 LBS
Potatoes	2,000	50 LBS
Rutabaga	200 LBS	20 LBS
Turnip	100 LBS	10 LBS

ADDENDUM E

Farm to School CHECKLIST For Producers & Local K-12 Schools

Welcome! Thank you for considering providing our schools with local products. This checklist is designed to begin a relationship and to communicate the needs of both, the Producer and the school Food Service Directors (FSD). Your answers will not prohibit you from becoming a provider for our schools. Please answer as accurately as you can.

Answers to these questions could lead to further conversation, farm visits and/or requests for documentation.

Personal / Farm Information

Name: _____ Farm Name: _____

Name of person to oversee food safety: _____

Address: _____

Phone: _____ E-mail: _____

Preferred method of communication: _____

Expected products for sale: _____

Total acres farmed: _____

Are all products you plan to sell coming from this farm? ☐ Yes ☐ No If no, please indicate what products come from another location:

_____

Would you be interested in hosting a field trip on your farm? ☐ Yes ☐ No

Production Information & Farm Self-Assessment

Personal Hygiene

Potable water is available for all workers. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

Training and supervision on proper sanitation, hand washing and hygiene practices is provided and implemented to all workers. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

All toilet, rest room and field sanitation facilities are clean and properly supplied with single-use towels, toilet paper, hand soap and potable water for hand washing. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

Workers are instructed to not work if he or she exhibits any sign(s) of infection such as fever, diarrhea, etc. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

Water/Irrigation & Chemicals

List the source of irrigation/water; pond, stream, well, municipal, other:_____

List irrigation techniques; flood, drip, sprinkler, other:_____

Pesticide/herbicide is used on the farm. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

If yes, please elaborate and/or cover more in-depth in your Food Safety Plan. Use a separate sheet of paper if necessary.:_____

_____

Animals/Wildlife/Livestock

Crop / production areas are located near or adjacent to a dairy, livestock or fowl production facility. ☐ Yes ☐ No ☐ N/A ☐ See attached Food Safety Plan

If yes, please provide documentation within your Food Safety Plan any natural barriers or safety procedures taken to prevent contamination of crop/production areas. Use a separate sheet of paper if necessary. _____

_____

Animals/Wildlife/Livestock (Continued)

Manure stored near or adjacent to crop / production area(s) is property contained to prevent contamination of crop / production areas.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Crop / production area(s) are monitored for the presence of wild or domestic animals including birds and rodents.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Measures are taken to limit wild or domestic animals from entering crop / production area(s).
□ Yes □ No □ N/A □ See attached Food Safety Plan

When / if composted raw manure is applied, it is incorporated at least 14 days prior to planting and 120 days prior to harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Manure used is properly composted to reduce expected leveles of pathogens.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Traceability

Product(s) delivered are clearly labeled with the date of harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Documentation of when a product is harvested and who the product is delivered to can be provided.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Field Harvesting & Transportation

Harvesting containers and bulk hauling vehicles coming into direct contact with product(s) are cleaned and sanitized on a scheduled basis. □ Yes □ No □ N/A □ See attached Food Safety Plan

All hand-harvesting equipment and implements are kept clean and sanitized.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Harvesting equipment and/or machinery coming in contact with product(s) is in good repair.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Efforts to remove excessive dirt and mud from product(s) and/or containers during harvest has been made.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Product(s) are properly stored. □ Yes □ No □ N/A □ See attached Food Safety Plan

Measures are taken to avoid cross contamination with animal and/or undocumented products in delivery.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Washing & Packing

A water quality assessment has been performed to determine the quality of water used for washing post harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

List source of post harvest / packing water:_____

Food contact surfaces are in good condition; clean and sanitized prior to use.
□ Yes □ No □ N/A □ See attached Food Safety Plan

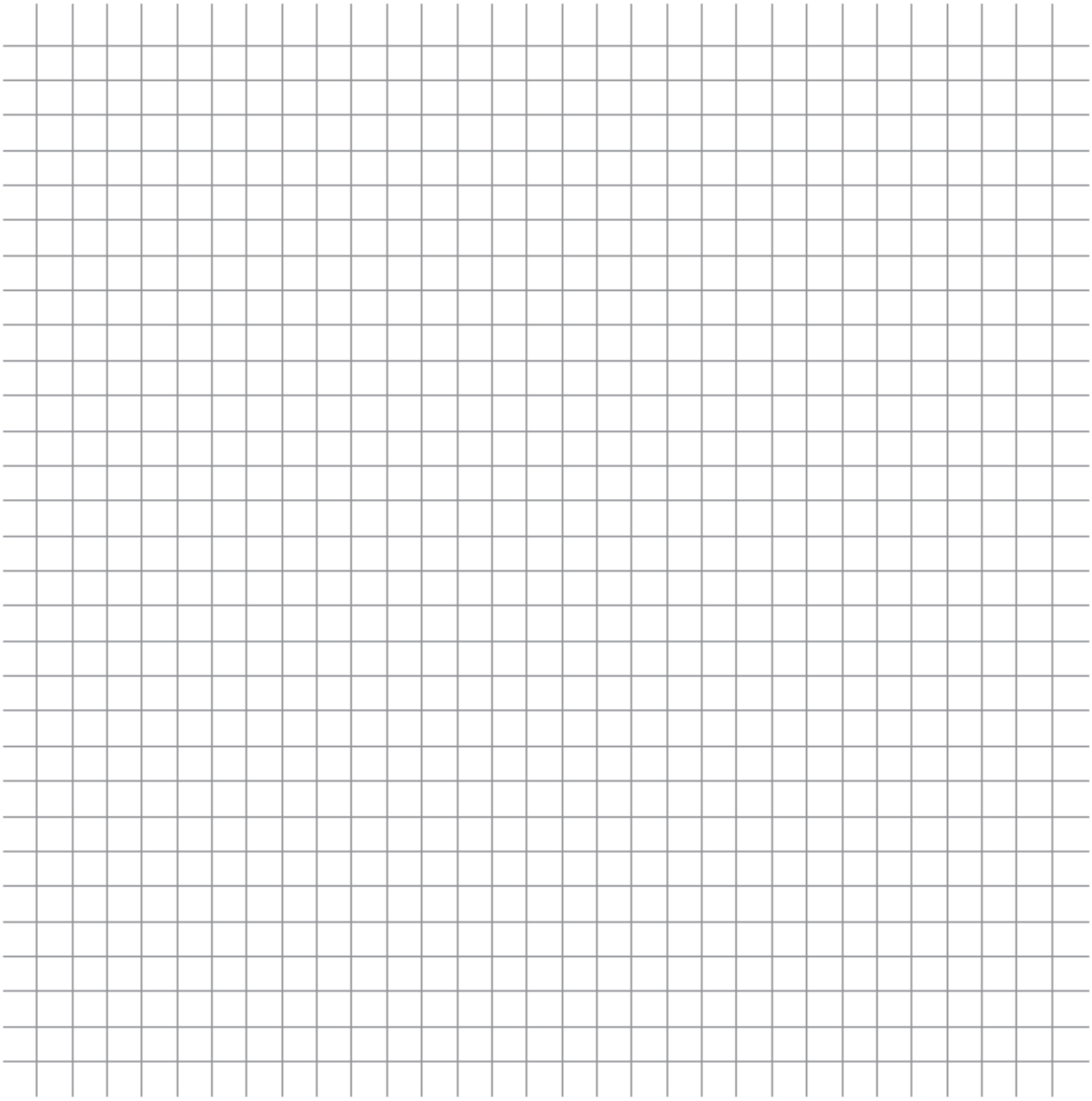
Ice used for cooling produce is manufactured from potable water and transported and stored under sanitary conditions.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Packing containers are properly stored and protected from contamination.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Measures are taken to ensure animals, domestic or wild, and pests cannot be in packing and storage facilities.
□ Yes □ No □ N/A □ See attached Food Safety Plan

*I confirm that information provided is true to the best of my knowledge:*_____
(Sign) (Date)

My Farm / Ranch _____ Acres



1. Crops Grown
2. Roads
3. Ditches - not irrigation
4. Ditches - irrigation (if applicable).
5. Livestock areas (if any).
6. Wildlife areas (if any).
7. Processing / Production areas for produce
8. Processing / Production for animal products (if any).
9. Water source
10. Bathrooms
11. Hand washing / Sanitizing areas
12. Compost / Manure areas

Down gradient slope

Up gradient slope

ADDENDUM F

Food Safety Plan

Producer Information

Name/Owners:_____

Farm Name:_____

Address:_____

City:_____ State:_____ Zip:_____

Business Phone:_____ Cell Phone: _____

Email:_____

Date this Safety Plan was completed:_____

Total Acres Farmed/Ranched:_____

Do all products you sell come from this farm? ☐ Yes ☐ No

If no, does this other location have a food safety plan? ☐ Yes ☐ No

Other information:_____

_____

_____

_____

Production Information: Personal Hygiene and Training

Potable water is provided for all workers by:	
Toilet, rest room and field sanitation facilities are clean and properly supplied with single use towels, toilet paper, hand soap and potable water for hand washing in the following locations:	
Sanitation facilities are checked, cleaned and stocked by this method:	

Training and supervision on proper sanitation, hand washing and hygiene practices is provided and implemented to all workers according to the attached training document and schedule or by:	
Workers are instructed to NOT work if they exhibit any sign(s) of infection such as fever, diarrhea, etc., in this manner:	
Water/Irrigation and Chemicals: Description of water/irrigation sources on this farm	
Ponds:	
Streams:	
Ditches:	
Well:	
Municipal Water:	
Other:	
Irrigation techniques used on this farm:	
☐ Flood ☐ Drip ☐ Sprinkler ☐ Other_____	
Pesticide/Herbicide Use (If none are used, enter N/A):	
Describe in depth, specifically, what pesticides are used including how often, on which products, why, when:	
Describe in depth, specifically, what herbicides are used	

including how often, on which products, why, when	
Animals/Wildlife/Livestock	
Are crop production areas located near or adjacent to dairy, livestock or fowl production facility? If yes, describe natural barriers, safety precautions and measures taken by this farm to prevent contamination of crop:	☐ Yes ☐ No
Crop/production areas are monitored for the presence of wild and domestic animals, including birds and rodents by:	
Measures taken to limit/ prevent wild or domestic animals from entering crop areas are:	
For safety purposes, any manure stored or adjacent to crop/production areas are contained by:	
When/if composted raw manure is applied, it is incorporated at least 14 days prior to planting and 120 prior to harvest. Records of any manure applications are kept in this manner:	
In order to reduce expected levels of pathogens, manure is properly composted by these methods:	
Traceability	
Prior to delivery, clear labeling of all products with the date of harvest is accomplished by these methods:	
We document when products are harvested and to whom the product is delivered.	☐ Log Book ☐ File (paper) ☐ Computer/Electronic File ☐ Other_____

Harvest dates and delivery records are maintained by:	
Field Harvesting and Transportation	
Harvesting containers, hand harvesting equipment/implements and bulk hauling vehicles that come into direct contact with product(s) are cleaned/sanitized according to this schedule, by this method:	
Harvesting equipment and/or machinery that comes into contact with product(s) is in good repair and maintained by:	
Efforts to remove excessive dirt and mud from product(s) and containers during harvest are done by:	
Product(s) are stored properly by these methods:	
The following measures are taken to avoid cross contamination with animal and/or undocumented products in delivery:	
Washing and Packing	
The source of water used for washing post-harvest product:	
Water quality used for washing post-harvest product is assessed by:	
Food surfaces are clean and sanitized prior to use following these methods:	
Ice used for cooling produce comes from:	
Methods for cleaning and storing packing containers are:	
The following measures are taken to ensure that animals, domestic or wild, and pests are not in packing and storage facilities:	

Grid map of farm/ranch attached; must include the following items:

- ☐Crops grown
- ☐Roads
- ☐Ditches (not irrigation)
- ☐Irrigation ditches
- ☐Livestock areas (if any)
- ☐Wildlife areas (if any)
- ☐Processing/production areas for produce and/or animals
- ☐Water sources
- ☐Bathrooms
- ☐Hand washing/sanitizing areas
- ☐Compost/manure areas
- ☐Gradient slopes

Report Prepared By:

_____

Signature

_____

Printed Name

Date: _____

ADDENDUM G

Instructions to Respond to the SW Bid for Local Fruits and Vegetables

- Respond to each school district separately.
  - The response forms are labeled with the name of the District at the top of the form.
  - Please print and complete the appropriate form for each District to who you wish to respond.

- On Response Forms, provide the quantity that you can provide *to each district*.
  - For example, if you are responding to five school districts, and on each district's form you indicate "10 CS, 5 LBS Green Peppers," this means you can provide 50 LBS per district, a total of 250 LBS.

- Response forms will be reviewed by the District named on the form.

- After a District chooses which products they wish to purchase, there may be pounds/cases unaccounted for. When this happens, another District may choose to award those pounds.

- As producers, you may decline to award to a District that you did not initially respond to.

- You may include all responses to the Districts in one sealed envelope addressed to Durango School District 9R as outlined in the bid.

- Clearly state your delivery price.

- Please use the suggested case sizes when responding and delivering product.

ADDENDUM H

Farm to School Bid Response: Durango School District 9-R

Farm Name: _____ Contact: _____ Phone#_____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

Addendum H, Farm to School Bid Response: Durango School District 9-R

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ADDENDUM I

Farm to School Bid Response: Ignacio School District 11-JT

Farm Name: _____Contact: _____Phone#_____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

Addendum I, Farm to School Bid Response: Ignacio School District 11-JT

Page 1 of 1

ADDENDUM J

Farm to School Bid Response: Bayfield School District

Farm Name: _____ **Contact:** _____ **Phone#** _____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

Addendum J, Farm to School Bid Response: Bayfield School District

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ADDENDUM K

Farm to School Bid Response: Mancos School District Re-6

Farm Name: _____Contact: _____Phone#_____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

ADDENDUM L

Addendum K, Farm to School Bid Response: Mancos School District Re-6

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ol District Re-6

Farm Name: _____Contact: _____Phone#_____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

Addendum L, Farm to School Bid Response: Montezuma-Cortez School District Re-1

Page 1 of 1

Farm to School Bid Response: Telluride School District

Farm Name: _____ Contact: _____ Phone# _____

Product	Description	Case Size/ Pack Size	Projected First Date of Delivery	Projected Amount Pack/Case Per Delivery for this District	Estimated Delivery Frequency	Projected Deliveries in Season to this District	Projected Total Available Pack/Cases to this District	Cost of Product by Pack/Case Size	Delivery Cost to this District	Total Cost
Example: Tomatoes	*Cherry*	*6 Pints/cs*	*9/15/2013*	*1-3 cases*	*Weekly*	*4 Weeks*	*12 cs*	*$7.50*	*$1.50*	*$9.00*
Example: Carrots	*Tops Trimmed*	*25 lbs*	*9/28/2013*	*100-300 lbs*	*2 x Month*	*2 Months*	*1,200 lbs*	*$25.00*	*$0.00*	*$25.00*

Addendum L, Farm to School Bid Response: Telluride School District

Page 1 of 1

Durango School District 9-R
Krista Garand – Coordinator of Food & Nutrition Services
2390 Main Avenue
Durango CO 81301
(970) 259-1630, ext 2042
kgarand@durangoschools.org

INVITATION FOR BID

BID #2021 Farm to School Beef Bid

Bid Response Due: 2:00 PM, Friday June 26, 2020

Please submit Bid Response to:

Durango School District 9-R
Nutrition Services, Krista Garand
201 E. 12th Street
Durango CO 81301

Purpose of Bid

Durango School District 9-R is requesting bids for the purchase of beef from local ranchers in order to bring in healthier, sustainably produced, and regionally sourced beef to our lunch program.

PART I- INSTRUCTIONS TO VENDORS

1.1 Invitation For Bid – 2021 Farm to School Beef Bid
Sealed bids will be accepted at Durango School District 9-R, Nutrition Services – 201 E. 12th Street, Durango, CO 81301 by 2:00 PM, June 26, 2020 for the furnishing of local beef to Durango School District 9-R per the Product Request Information sheet that accompanies this bid. This will be in accordance with the terms and conditions established in this bid. All bids received after the time specified will not be opened or considered. The vendor is responsible for having their bid in on time, at the location specified.

1.2 Preparation of Bid Documents
1.2.1 All bids must be typewritten or printed in ink.
1.2.2 All bids must be addressed and mailed to Durango School District 9-R, Nutrition Services – 201 E. 12th Street, Durango, CO 81301
1.2.3 Bid pricing should be submitted in two parts: raw food cost and delivery cost. Inclusion of type written specs for bid must include pack size, case size, case price delivered, fat content, and total bid cost.
1.2.4 No fax copies will be accepted.
1.2.5 An agent authorized to enter into an agreement must sign bid.

1.3 Withdrawal of Vendors
Bids may be withdrawn with written notice from agent who signed the original document. Once submitted, documents become the property of Durango School District 9-R. When documents are opened, they become public information and restrictions put upon the District regarding the sharing of information after opening will be grounds to reject the bid.

1.4 Award
1.4.1 Award shall be based on, but not limited to the following:
Proposed pricing
Vendor performance
Financial responsibility of the vendor
Delivery – Vendor's ability to meet delivery and stocking requirements

In evaluating bids, it will be taken into consideration whether or not the bids comply with prescribed requirements. A Vendor may be disqualified based on failure to meet any of the above listed criteria. Discrepancies in the multiplication of units of work and unit prices will be resolved in favor of the unit price. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum.

Right is reserved to award this bid in part or in whole to a single supplier or multiple suppliers or to reject any or all proposals if it is in the best interest of Durango School District 9-R to do so. The District School Board reserves the right to reject any or all bids or parts of bids and to waive informalities to the proposals.

Estimates of pounds needed are based on purchasing history and not a guarantee of purchase. Due to Covid-19, estimated product usage is difficult to determine at this time.

PART 2-GENERAL SPECIFICATIONS

2.1 Contract Period

The Contract Period is from July 1, 2020-June 30, 2021.

2.2 Contract Pricing

The price per unit must remain firm for the full contract period. Pack sizing must be included in pricing.

2.3 Contract Cancellation

Unless otherwise stated, any contract entered into as a result of the bid may be cancelled by either party upon 30-day written notice to the effective date of cancellation. Cancellation may be in whole or in part.

2.4 Vendor Performance

If the vendor is unable to perform under the terms of the contract, we reserve the right to cancel this contract.

2.5 Delivery Guarantee

Vendor must notify District(s) in advance of delivery, if unable to deliver items as ordered.

2.6 Delivery Instructions

The prices quoted shall be for delivery to the locations specified in the Delivery Locations document.

At receipt of delivery, product is to be inspected for acceptable quality and quantities verified against the invoice. Any discrepancies are to be noted on the invoice.

Boxes shall be labeled with item and quantities in the container.

All beef shall be delivered in solid, frozen state. If packaging shows any sign of defrosting, refreezing, freezer burn, contamination or mishandling the District(s) may refuse the delivery at no cost.

2.7 Payment Terms

Durango School District 9-R will not accept payment terms of less than 30 days.

2.8 Compliance with Laws
All items must comply with all applicable Local, State and Federal laws pertaining thereof.

2.9 How Packed
If Bidder proposes a pack size which differs from pack shown, Bidder shall state size offered and convert the estimated usage to conform to proposed bid size.

PART 3-ACCEPTANCE

3.1 The vendor agrees to comply with all Federal, State and local laws, ordinances and all applicable rules, regulations and standards.

3.2 Durango School District 9-R is tax-exempt. Exemption forms will be issued upon request.

3.3 The vendor certifies that this proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies or equipment and is, in all respects, fair and without collusion or fraud. The vendor understands that collusive bidding is a violation of federal law and can result in fines, prison sentences and civil damage awards. The vendor further agrees to abide by all condition of this proposal.

SIGNED: _____

NAME: _____

VENDOR NAME: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____

Product Request Information

District	Product	Pack Size	Total Case Weight	Estimated Usage
Durango 9-R	Ground Beef Must be 80/20 or better	5 lbs.	25 lbs.	153 cs. 3825 lbs.

Note: Due to Covid-19, estimated product usage is difficult to determine at this time.

****Bid response should be on the Bid Response Form**

Bid Response Form
Due 2:00 P.M. Friday, June 26, 2020

Name of Farm or Ranch: _____

Contact Information:

Phone: _____

Email: _____

Durango School District 9-R

Product	Fat Content	Pack Size	Total Case Weight	Number Cases	Total Pounds	Price	Delivery Cost	Total Cost
Ground Beef								

*****You may respond to all or part of the pounds requested. Your bid will be considered if you cannot fulfill the entire order because the bid may be awarded to more than one vendor.***

Farm to School
CHECKLIST For Producers & Local K-12 Schools

Welcome! Thank you for considering providing our schools with local products. This checklist is designed to begin a relationship and to communicate the needs of both, the Producer and the school Food Service Directors (FSD). Your answers will not prohibit you from becoming a provider for our schools. Please answer as accurately as you can.

Answers to these questions could lead to further conversation, farm visits and/or requests for documentation.

Personal / Farm Information

Name: _____ Farm Name: _____

Name of person to oversee food safety: _____

Address: _____

Phone: _____ E-mail: _____

Preferred method of communication: _____

Expected products for sale: _____

Total acres farmed: _____

Are all products you plan to sell coming from this farm? □ Yes □ No If no, please indicate what products come from another location:

_____

Would you be interested in hosting a field trip on your farm? □ Yes □ No

Production Information & Farm Self-Assessment

Personal Hygiene

Potable water is available for all workers. □ Yes □ No □ N/A □ See attached Food Safety Plan

Training and supervision on proper sanitation, hand washing and hygiene practices is provided and implemented to all workers.
□ Yes □ No □ N/A □ See attached Food Safety Plan

All toilet, rest room and field sanitation facilities are clean and properly supplied with single-use towels, toilet paper, hand soap and potable water for hand washing. □ Yes □ No □ N/A □ See attached Food Safety Plan

Workers are instructed to not work if he or she exhibits any sign(s) of infection such as fever, diarrhea, etc.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Water/Irrigation & Chemicals

List the source of irrigation/water; pond, stream, well, municipal, other:_____

List irrigation techniques; flood, drip, sprinkler, other:_____

Pesticide/herbicide is used on the farm. □ Yes □ No □ N/A □ See attached Food Safety Plan
If yes, please elaborate and/or cover more in-depth in your Food Safety Plan. Use a separate sheet of paper if necessary.:_____

_____

Animals/Wildlife/Livestock

Crop / production areas are located near or adjacent to a dairy, livestock or fowl production facility.
□ Yes □ No □ N/A □ See attached Food Safety Plan

If yes, please provide documentation within your Food Safety Plan any natural barriers or safety procedures taken to prevent contamination of crop/production areas. Use a separate sheet of paper if necessary. _____

_____

Animals/Wildlife/Livestock (Continued)

Manure stored near or adjacent to crop / production area(s) is property contained to prevent contamination of crop / production areas.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Crop / production area(s) are monitored for the presence of wild or domestic animals including birds and rodents.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Measures are taken to limit wild or domestic animals from entering crop / production area(s).
□ Yes □ No □ N/A □ See attached Food Safety Plan

When / if composted raw manure is applied, it is incorporated at least 14 days prior to planting and 120 days prior to harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Manure used is properly composted to reduce expected leveles of pathogens.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Traceability

Product(s) delivered are clearly labeled with the date of harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Documentation of when a product is harvested and who the product is delivered to can be provided.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Field Harvesting & Transportation

Harvesting containers and bulk hauling vehicles coming into direct contact with product(s) are cleaned and sanitized on a scheduled basis. □ Yes □ No □ N/A □ See attached Food Safety Plan

All hand-harvesting equipment and implements are kept clean and sanitized.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Harvesting equipment and/or machinery coming in contact with product(s) is in good repair.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Efforts to remove excessive dirt and mud from product(s) and/or containers during harvest has been made.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Product(s) are properly stored. □ Yes □ No □ N/A □ See attached Food Safety Plan

Measures are taken to avoid cross contamination with animal and/or undocumented products in delivery.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Washing & Packing

A water quality assessment has been performed to determine the quality of water used for washing post harvest.
□ Yes □ No □ N/A □ See attached Food Safety Plan

List source of post harvest / packing water:_____

Food contact surfaces are in good condition; clean and sanitized prior to use.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Ice used for cooling produce is manufactured from potable water and transported and stored under sanitary conditions.
□ Yes □ No □ N/A □ See attached Food Safety Plan

Packing containers are properly stored and protected from contamination.
□ Yes □ No □ N/A □ See attached Food Safety Plan

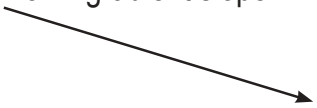
Measures are taken to ensure animals, domestic or wild, and pests cannot be in packing and storage facilities.
□ Yes □ No □ N/A □ See attached Food Safety Plan

*I confirm that information provided is true to the best of my knowledge:*_____
(Sign) (Date)

My Farm / Ranch _____Acres

1. Crops Grown
2. Roads
3. Ditches - not irrigation
4. Ditches - irrigation (if applicable).
5. Livestock areas (if any).
6. Wildlife areas (if any).
7. Processing / Production areas for produce
8. Processing / Production for animal products (if any).
9. Water source
10. Bathrooms
11. Hand washing / Sanitizing areas
12. Compost / Manure areas

Down gradient slope



Up gradient slope

Worksheet 2B: School Market Readiness Evaluation

- A Tool for Meeting Common Vendor Requirements and Responding to School Solicitations-

Use this worksheet to evaluate your market readiness for entering school markets. We recommend that you complete this worksheet before connecting with school buyers, so that you are ready to answer any questions that may come up and address important considerations for working together to meet your farm to school goals!

Date: _____

Name of person filling out form: _____

Contact Information: (phone/email/)

_____

Farm Information

1. Name of farm_____ _____
2. Geography (City, County, State) _____
3. Approximate farm size _____acres in production.
4. Approximate farm size _____in sales last year.
5. Approximate farm capacity _____workers and staff.

Business Information

6. Do you have a business license? ____YES ____NO
7. Do you have product liability insurance? ____YES ____NO
    a. What is your coverage limit? _____
    b. Other insurance? _____
8. Are you able to distribute your product? ____YES ____NO
9. How far are you willing to drive to access a market? How many drops sites are you willing to serve? How frequently?
    (Please describe)
    _____
10. Do you have refrigerated trucks or other temperature control methods? ____YES ____NO _____
11. Does your farm have any of the following certifications or credentials?

____Good Agricultural Practices (GAP)

____Good Handling Practices (GHP) Certification

____Organic Certification

____ Approved Vendor or Supplier Program

____Other (Please describe)

_____

Infrastructure & Post-Harvest Handling

12. The following are common vendor requirements for school sales. Please check below to indicate the recordkeeping practices you employ on your farm.

    ____Food Safety Manual

    ____Farm Map (including products and row feet/acre)

    ____Harvest Log

    ____Washing Log

    ____Packing Log

    ____Product Recall Procedure

    ____Invoicing Procedure

    ____Labeling and Traceability Systems

    ____New boxes (or food-safe liners/reusable crates)

13. Do you have a washing station? ____YES ____NO
14. Do you have a packing station and basic storage infrastructure? ____YES ____NO
15. Do you have on-farm cold storage? ____YES____NO
16. Do you have on-farm processing equipment? ____YES____NO

Farm to School Experience

17. Have you ever sold directly to local and/or regional schools? ____YES ____NO
18. Did you sell to school markets last season? ____YES ____NO
19. Approximately how much did you sell to schools in 2019-2020? ($ or lbs)

    _____

    _____

20. What products did you sell to schools? (please list)

    _____

    _____

    _____

21. What market channels do you utilize to sell your products to schools?

Local Retail Outlets: (Please list)

_____

_____

Food Hubs (Please list)

_____

_____

Regional Distributors: (Please list)

_____

_____

National Wholesale Distributors: (Please list)

_____

_____

Direct-to-School: Micro Purchase Agreements and Informal Contracts with School Districts (Please list):

_____

_____

Direct-to-School: Formal Contracts with School Districts (Please list)

_____

_____

Other: (Please list)

_____

_____

<u>Standing out as a Local Vendor:</u>

22. Would you be interested in providing support for any of the following Farm to School activities?

- ____ Provide promotional materials (logo, photos, brochure, etc.)
- ____ Farmer in the classroom/cafeteria educational visits
- ____ Hosting farm visits for students
- ____ Hosting farm tours for school staff, administration, and policy makers
- ____Technical support for school gardens/greenhouses
- Other:

_____

_____

Farm to School Marketing Information

References

Reference 1: _____(company/organization)

_____ (name and title)

_____ (address)

_____ (phone and email)

Reference 2: _____ (company/organization)

_____ (name and title)

_____ (address)

_____ (phone and email)

Reference 3: _____ (company/organization)

_____ (name and title)

_____ (address)

_____ (phone and email)

Worksheet 2C: Responding to School Solicitations

1. Review the following sample solicitations:
    a. Durango Public Schools
        i. Invitation for Bid SY 2020-2021
        ii. Farm to School Beef Bid SY 2020-2021
        iii. Farm to School Checklist for Producers and Local K-12 Schools
    b. Minneapolis Public Schools
        i. MPS Farm to School Fresh Produce RFP #: F2S 2020
        ii. Farm to School Toolkit (2016)
    c. Albuquerque Public Schools
        i. New Mexico Produce Growers Bid #21-004MS
        ii. Price List

2. Identify the School Solicitation Building Blocks
    a. What does the **Background Section** tell you about the school district's farm to school goals?
    b. What does the **Description of Goods and Services** tell you about the school district's product needs?
    c. What does the **Procurement Method** tell you about how the purchase will be conducted?
    d. What do the **Technical Requirements** tell you about vendor requirements?
    e. What do the **Terms and Conditions** tell you about procedural requirements for being responsive and responsible in your bid?
    f. What does the **Timeline** tell you about the duration of the agreement?

3. Choose a product and respond to the solicitation (submit a bid) as requested.
    a. **Vendor Requirements:** Assess your business' compliance with the stated requirements for potential vendors.

        - Does your business/operation meet the technical requirements for becoming an approved vendor for the school district?
        - Are there any stated preferences that you may qualify for as a local vendor, such as geographic preference?
        - Can you prepare a bid that is responsive to the solicitation terms?
        - Can you maintain responsibility for the stated contract terms?

b. **Product Information:** Make sure your bid is competitive by providing product information for ALL products you are interested in selling to the school district during the contract terms.

   - Complete product availability and pricing sheets in the sample solicitations. Be sure to include product specifications by variety/processing type, availability of product quantities (season duration) and frequency, grading standards and pack-size, pricing information, etc.

   - Do the product specifications align with your quality management and post-harvest handling systems?

   - Do you have the ability to sort and grade products as requested? Meet pack-size requirements? Provide pricing information as requested?

c. **Farm to School Offerings:** List any additional services/offerings you can provide the school district to stand out as a local vendor.

   - Promotional marketing materials
   - Farmer in the classroom/cafeteria educational visits
   - Farm visits for students
   - Farm tours for school staff, administration, and policy makers
   - Technical support for school gardens/greenhouses
   - Other _____

Worksheet 2D:
School Nutrition Director Meeting Checklist

Being familiar with the school meal program you want to work with will help you decide how best to approach the School Nutrition Director, communicate effectively, and avoid common pitfalls with new market relationships. You should make an opportunity to meet, learn about their specific needs and requirements, and set some goals for working together. Here are some key points to discuss together:

- ❑ Goals: Understanding their motivations may help you build relationships.
    - What motivates them to do this work?
    - What are their food service program goals? How does farm to school fit in?

- ❑ Products: Ask about their product needs to assess whether your products could be a good fit.
    - What kinds of products are they interested in purchasing locally? How much? How frequently?
    - Which local products have been successful in the past? Which have not been so successful, and why?
    - What products do they commonly purchase? How much? How frequently?
    - Are they open to new products? Seasonal specials, traditional foods, etc.?
    - How are they used to receiving products? Processing requirements? Pack size and standards?
- ❑ Delivery: Ask about their delivery needs to see if your distribution system aligns.
    - Can products be delivered to a central site or do they need delivery to each school site?
    - What are the infrastructure requirements for delivery (like refrigerated trucks, pallets, and loading docks)?
    - What are the current options for delivery days and times?
    - Who is responsible for coordinating deliveries?
- ❑ Sourcing: Ask about their past experiences sourcing through certain market channels.
    - Are they interested in purchasing directly from local farmers or do they prefer to work through a distributor?
    - Where are they currently purchasing foods?
    - What local or regional vendors do they already work with?
    - What local farms have they purchased from in the past?
    - What has their experience been? Anything they would like to do differently?
- ❑ Procurement: Ask about any purchasing details for products you're interested in selling.
    - How much do they typically spend on these products (per purchase and annual)?
    - Can they share some examples of competitive product pricing?
    - When are solicitations issued and how can they be accessed?
    - Do they have vendor requirements outside of the state and federal regulations?
    - Do they have any vendor preferences, such as geographic preference?
    - Is there any opportunity for piloting sales through an informal agreement, such as a micro-purchase?
- ❑ Payment: Ask about their invoicing and payment processes to ensure these work for your farm business.
    - What information requirements do they have for invoicing?
    - What formatting requirements (i.e., computer, handwritten, specific software or platforms)?

- Do they have a standard template they can share?
- How frequently do they require invoicing? (i.e., monthly, upon delivery, etc.)
- How are payments processed? (i.e., vendor account, paper checks, etc.)
- What is the turnaround time for payments? Are there circumstances to be aware of that could cause potential delays?

❑ Contingencies: Make a plan for addressing the unexpected to reduce risk and maintain good working relationships. Be sure to include communication procedures for addressing the following:

- Missed or delayed delivery
- Product quality issues and solutions for addressing them
- Price changes and market trends
- Product availability issues due to crop failure, natural disasters, etc.

More Tips for Working Together Effectively:

Remember to be patient—working directly with farmers may be as new to School Nutrition Directors as working with schools is to you! Here are a few things you can do to help jump-start relationship building and build trust:

- Be prepared for your conversation.
  - Come prepared with an overview of your practices and a list of questions to cover with them, to help ensure that the meeting is productive and benefits both of you. We recommend using Worksheet 2B: School Market Readiness Evaluation to gather relevant information about your farm business.
- Do some market research.
  - Take the time to learn about them by practicing some basic school food vocabulary and reviewing current menus.
- Highlight your brand.
  - Bring along some product to sample—the quality will speak for itself! Also, share any marketing materials you may have developed, so they can get to know you better, support retention for your brand, and see you as a partner in achieving their farm to school goals.
- Share your expertise.
  - Be proactive in sharing information about your operational cycles (production planning, planting cycles, product availability, etc.). This will help you find common ground and help support negotiations.
- Never show up unannounced.
  - Always call ahead, make an appointment if possible, and avoid busy times such as during lunch periods (i.e., 10am-1pm).
- Avoid judgement and don't shame school food.
  - Remember, school food service staff have the same goals as your farm: to feed hungry kids and support the community.
- Note that communication is key.
  - Be sure to get direct contact information for all parties involved in the procurement process, ask them what their preferred mode of communication is (email, text, in-person), and establish follow-up actions.
- Recognize that developing trusted relationships takes time.
  - It may be necessary to start slowly and build trust through offering samples, piloting sales, and pulling in support from local food champions at the school. Also, fulfilling your agreements on time and with a quality product builds trust.

APPENDIX D: SAMPLE MENU

Here is a menu from Minneapolis Public Schools. Farm to School items are labeled with a F2S tractor symbol.

You will notice a lot of roasted or cooked vegetables that are served alongside entrees. However, many of their Farm to School items – like romaine and kale, peppers, carrots, melon, apples, kohlrabi, etc. – are served raw through salad bars, which are not reflected in this menu.


October 2019
Middle & Secondary
M T W T F
1
Cheese Lasagna
Garlic Toast
Broccoli
Burger, Chicken, or Bean Burger
Baked Beans
Chicken Caesar Salad
2
Pancakes
Cheese Omelet
Spiced Pears
Latin Bowl
with Toppings
Chicken Caesar Salad
Chef Shack Nachos
Fiesta Corn, Salsa
Apple Kohlrabi Slaw
Apple Crisp
Latin Bowl
with Toppings
Rainbow Dragon
Chicken Salad
3
Roast Turkey
with Gravy
Mashed Potatoes
Delicata Squash
Choice of Pizza
Rainbow Dragon
Chicken Salad
7
Buffalo Chicken
Flatbread
Roasted Potatoes
Choice of Pizza
Cheese
Beef Pepperoni
or Chicken Alfredo
8
Turkey Alambre Tacos
Yellow Rice
Roasted Peppers
Asian Bowl
with Toppings
Chef Salad
9
Pork Sandwich
with BBQ Sauce
or Black Bean Burger
Coleslaw
Asian Bowl
with Toppings
Chef Salad
10
Chicken Cacciatore
with Pasta
Roasted Cauliflower
Minneapolis Deli
Buffalo Chicken Salad
CRUNCH!
11
Tater Tot Hotdish
Butternut Squash
Minneapolis Deli
Buffalo Chicken Salad
14
Potato Crusted Fish
JoJo Potatoes
Green Beans
Burger, Chicken, or Bean Burger
JoJo Potatoes
15
Burrito Bake
Seasoned Corn
Burger, Chicken, or Bean Burger
Baked Beans
Beef Taco Salad
or Bean Taco Salad
16
17
18
No School
21
Chili Cheese
Hot Dog
Tater Tots
Choice of Pizza
Cheese
Beef Pepperoni
or Greek
22
Swedish Meatballs
with Pasta
Brussels Sprouts
Latin Bowl
with Toppings
Chicken Caesar Salad
23
Buffalo Chicken
Flatbread
Roasted Potatoes
Latin Bowl
with Toppings
Chicken Caesar Salad
24
Roast Turkey
with Gravy
Mashed Potatoes
Roasted Beets
Minneapolis Deli
Rainbow Dragon
Chicken Salad
25
Baked Potato
with Turkey, Cheddar
Broccoli
Minneapolis Deli
Rainbow Dragon
Chicken Salad
28
Chicken or
Cheese Tamale
Rice, Pinto Beans
Burger, Chicken, or Bean Burger
JoJo Potatoes
29
Chicken Parmesan
Spaghetti Squash
Burger, Chicken, or Bean Burger
Tater Tots
Chef Salad
30
Beef Chili
Sweet Potato JoJos
Asian Bowl
with Toppings
Chef Salad
31
French Herb Chicken
Parsley Buttered
Potatoes, Rainbow Carrots
Asian Bowl
with Toppings
Buffalo Chicken Salad
1
No School
Know Your Food
MEATLESS AVAILABLE
FARM TO SCHOOL
CONTAINS PORK
CONTAINS FISH
JR IRON CHEF RECIPE
We use Whole Grains. Skim & 1% Milk is offered.
This institution is an equal opportunity provider.
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October 2019
High School
M
T
W
T
F
Cheese Lasagna
Garlic Toast
Broccoli
Latin Bowl
with Toppings
Burger, Chicken, or Bean Burger
Baked Beans
Chicken Caesar Salad
2
Pancakes, Cheese Omelet, Spiced Pears
Latin Bowl
Burger, Chicken, or Bean Burger
Roasted Potatoes
Chicken Caesar Salad
Chef Shack Nachos
Fiesta Corn, Salsa
Apple Kohlrabi Slaw
Apple Crisp
Latin Bowl
Choice of Pizza
Rainbow Dragon Chicken Salad
3
Roast Turkey with Gravy
Mashed Potatoes
Delicata Squash
Latin Bowl
Choice of Pizza
Rainbow Dragon Chicken Salad
7
Buffalo Chicken Flatbread
Roasted Red Potatoes
Asian Bowl
with Toppings
Choice of Pizza
8
Turkey Alambre Tacos
Yellow Rice
Roasted Peppers
Asian Bowl
Choice of Pizza
Chef Salad
9
Pork Sandwich
with BBQ Sauce
or Black Bean Burger
Coleslaw
Asian Bowl
Minneapolis Deli
Chef Salad
10
Chicken Cacciatore with Pasta
Roasted Cauliflower
Asian Bowl
Minneapolis Deli
Buffalo Chicken Salad
11
Tater Tot Hotdish
Butternut Squash
Asian Bowl
Minneapolis Deli
Buffalo Chicken Salad
14
Potato Crusted Fish
JoJo Potatoes
Green Beans
Mediterranean Bowl
with Toppings
Burger, Chicken, or Bean Burger
JoJo Potatoes
15
Burrito Bake
Seasoned Corn
Mediterranean Bowl
Burger, Chicken, or Bean Burger
Baked Beans
Beef Taco Salad or Bean Taco Salad
16
17
18
No School
21
Chili Cheese Hot Dog
Tater Tots
Latin Bowl
with Toppings
Choice of Pizza
22
Swedish Meatballs with Pasta
Brussels Sprouts
Latin Bowl
Choice of Pizza
Chicken Caesar Salad
23
Buffalo Chicken Flatbread
Roasted Potatoes
Latin Bowl
Minneapolis Deli
Chicken Caesar Salad
24
Roast Turkey with Gravy
Mashed Potatoes
Roasted Beets
Latin Bowl
Minneapolis Deli
Rainbow Dragon Chicken Salad
25
Baked Potato
with Turkey, Cheddar
Broccoli
Latin Bowl
Minneapolis Deli
Rainbow Dragon Chicken Salad
28
Chicken or Cheese Tamale
Rice, Pinto Beans
Asian Bowl
with Toppings
Burger, Chicken, or Bean Burger
JoJo Potatoes
29
Chicken Parmesan
Spaghetti Squash
Asian Bowl
Burger, Chicken, or Bean Burger
Tater Tots
Chef Salad
30
Beef Chili
Sweet Potato JoJos
Asian Bowl
Burger, Chicken, or Bean Burger
Roasted Potatoes
Chef Salad
31
French Herb Chicken
Parsley Buttered Potatoes, Rainbow Carrots
Asian Bowl
Choice of Pizza
Buffalo Chicken Salad
1
No School
Know Your Food
MEATLESS AVAILABLE
FARM TO SCHOOL
CONTAINS PORK
CONTAINS FISH
JR IRON CHEF RECIPE
We use Whole Grains. Skim & 1% Milk is offered.
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NOTES

NOTES

AGRICULTURAL PRODUCERS' TOOLKIT

Bringing the Farm to School

BRINGING THE FARM TO SCHOOL

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