



# Procurement

Indiana Grown for Schools Network  
Farm to School Toolkits

# Table of Contents



<b>Introduction</b>	
Local Procurement in Schools	2
Why Local Food?	3
Indiana Grown for Schools	7
Local Food Councils	7
<b>Chapter 1: Buyers</b>	8
Why Should Buyers Procure Local Food	9
Definitions	9
Procuring Local Food for Child Nutrition Programs	9
Food Safety Considerations	10
Templates	11
Buying Local at Different Levels	13
Harvest of the Month	17
School Integration	18
<b>Case Study: Bartholomew Consolidated School Corporation</b>	20
<b>Chapter 2: Producers</b>	22
Why is Selling to Schools Beneficial?	23
What Do Schools Expect From You?	26
Peer Collaboration	29
Cooperative Production/Marketing	30
Using Food Hubs or Distribution Partners	31
Food Safety and Wholesale Readiness	32
Selling to Schools at Scale	35
<b>Case Study: Beautiful Edibles</b>	38
<b>Case Study: Fischer Farms</b>	41
<b>Chapter 3: How Administrators Can Support Farm to School</b>	42
How to Support Local Procurement	44
School Board Support	44

# Table of Contents



<b>Chapter 4: Community Engagement</b>	45
Why Engage Community Stakeholders?	46
How to Engage Community Stakeholders	47
Engaging Community Partners	48
Engaging Your Agriculture Education Department	49
Engaging 4H and FFA	49
<b>Case Study: Paoli Community School Corporation</b>	50
<b>Case Study: Fresh Local Food Collaborative</b>	53
<b>Appendices</b>	60
Appendix A: Important Explanations and Definitions	61
Appendix B: Small Purchase Quote	68
Appendix C: Phone Quote Example	69
Appendix D: Manchester Community Schools RFP Example	70
Appendix E: Manchester Community Schools Scoring Sheet Example	71
Appendix F: Bartholomew School Corporation RFP	72
Appendix G: Bartholomew Consolidated School Corporation Quotes	73
Appendix H: Bartholomew Consolidated School Corporation Checklist For Retail Purchasing of Local Produce	74
Appendix I: Writing Clear, Through Specifications	75
Appendix J: Indiana Seasonality Chart	77
Appendix K: Pecks to Pounds Conversation Document	78
Appendix L: USDA Foods: A Resource for Buying Local	80
Appendix M: Using DoD Fresh to Purchase Local Produce	82
Appendix N: Geographic Preference: What It Is and How to Use It	84
Appendix O: Sample Menu	86
<b>Index of Resources</b>	87



# INTRODUCTION

Local procurement describes the process of purchasing locally grown and/or produced items for use in school meals. As one of three pillars of farm to school programming, local procurement supports local economies and provides local, fresh food products to Hoosier students. Incorporating more local, nutrient dense foods into the cafeteria can enhance, or even kickstart, other farm to school programming efforts.

This toolkit provides a general introduction to local procurement, which includes the benefits of local procurement and local foods, an overview of Indiana Grown for Schools, and definitions to more easily understand the technicalities and logistics of procurement. Broken up into four different chapters, the Buyer and Grower sections discuss the concepts and ideas one needs to understand to begin and be successful in the farm to school market. Ideally, this toolkit will be used to make the process of local procurement more accessible for all to ultimately increase the prevalence of farm to school programs and improve health among children in diverse communities.





## Local Procurement in Schools

Local food is a term understood to be food that is grown and transported nearby, oftentimes in the same state. Though there is no universal definition of local food, there is wide consensus around the environmental, economic, health, and community benefits<sup>1</sup> that local food can provide. Local procurement occurs when food is produced and acquired from an organization or institution nearby and has widespread benefits, including increased access to healthy food, higher quality of meals served and strengthened local food systems.<sup>2</sup> There are many ways that local procurement might happen, such as buying from a local producer or distributor or donations of locally produced foods.

There is a great opportunity to grow the number of schools buying Indiana products, the number of products they are buying, and provide students greater access to local fruits, vegetables and other foods. Farm to school programs that integrate local food into cafeterias and engage children with hands-on gardening, and other educational activities, have been shown to have positive impacts on their dietary behavior and health outcomes.<sup>3</sup> Serving local food in school cafeterias increases students' rates of consumption of fruits and vegetables,<sup>4</sup> especially when combined with hands-on activities such as cooking, gardening, and nutrition education.<sup>5</sup>



## Why Local Food?

There are many reasons to purchase local foods. Local food buying helps to support local agricultural economies, bridge divides along the value chain, and support lifelong positive nutritional habits.<sup>8</sup>

### **Economic Benefits:**

Local food systems support growers in our own community. Dollars spent directly with a neighboring grower increase the money kept in the local economy. Institutions - particularly schools, hospital systems and restaurants – provide an opportunity to create sizable demand, contributing to the potential of growers achieving economies of scale and remaining a viable farm business.<sup>1,5</sup>

The localization of food supply chains (for example, localizing a crop's production) can result in positive economic impacts—lowering production, environmental, and transportation costs and thus benefiting consumers via lower prices—but these benefits vary by region and product.<sup>6,7,8</sup> Recent studies also suggest that local businesses, including small and midscale farms, are more likely than their larger-scale counterparts to buy supplies from local businesses, and farms that sell locally spend more on labor regardless of their size.<sup>8</sup>

It has been estimated that if Southwest Indiana residents purchased \$5 of food each week directly from farmers in the region, this would generate \$98 million of farm income for the small region in one year.<sup>2</sup> Keeping food dollars local can have a large impact on communities.



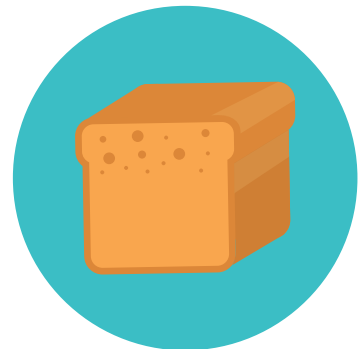
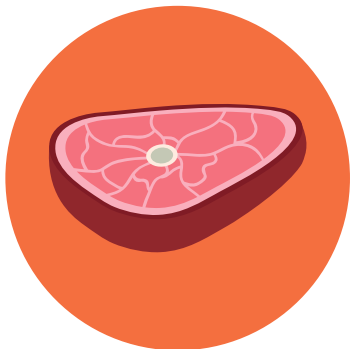
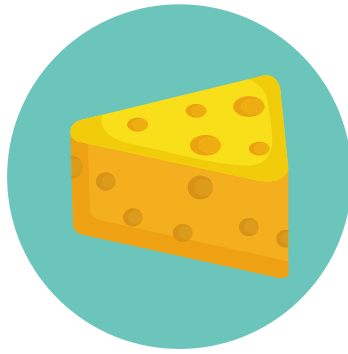
## Community Engagement

Local procurement can not only be a mechanism by which schools support local economies through dollars, but increase the social connectedness of students and farmers across generations, career types, and to their community at large. Local food systems, including programs like farm to school, have been shown to contribute to community engagement among citizens.<sup>3</sup> When relationships between grower and buyer flourish, growers can better understand preferences of the consumer and can base planting decisions on those preferences.

Community engagement can be paired with agricultural education and school gardens in a variety of ways. Ag education could incorporate a visit from the farmer who grew the latest local product featured in the cafeteria. School gardening can bring in Master Gardener programs and other volunteer organizations in the community. Communication from school to home can increase parent involvement and encourage the home environment to talk about, prepare, and enjoy new foods introduced to children in the school cafeteria. No matter the method of community engagement, local procurement provides a foundation for building a strong, connected community.







## Foundations for Lifelong Healthy Habits

When procuring local, fresh food, cafeterias have the ability to support the foundation of positive, lifelong, nutrition habits. The nutrient density in produce can be affected by the time of consumption after harvest, as well as the way produce is handled/stored during transportation. Local produce is picked and often consumed at the peak of ripeness. Increasing the nutrient density and variety of foods offered encourages students to try new foods.<sup>9</sup> Paired with ag and nutrition education, school gardens, and greater community connectedness, students learn about and are influenced by their local food system, increasing consumption of fruits and veggies and becoming more aware food citizens.

# Health Equity

Local procurement has an important role to play in the advancement of health equity within communities. Health equity means that everyone has a fair and just opportunity to be as healthy as possible - this requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care (Robert Wood Johnson Foundation). When institutions, such as schools and other educational settings, center equity in their purchasing decisions and processes, their spending can support good health and economic prosperity within communities affected by health inequities.

## Institutions Buying Food for Health & Equity

*A more just food system through the power of procurement*

Large institutions, like government agencies and hospitals, purchase a lot of food and drinks every day. These institutions are an important source of food, since Americans eat more than one-third of their calories outside the home. If the purchasing decisions of large institutions are driven by good food values, it will benefit community wellness, the local economy, and the environment.

### FOOD SYSTEM FACTS

- LOCAL ECONOMIES:** Every dollar spent on local food generates another \$0.40–\$1.60 of economic activity.
- ENVIRONMENTAL SUSTAINABILITY:** If US public schools reduced their meat purchases by 30%, they could reduce their carbon footprints by 700 million kgs at no extra cost.
- VALUED WORKFORCE:** One out of every 7 workers in the US works along the food chain, yet many of these jobs come with low pay. Procurement policies can help improve their conditions.
- HEALTH & NUTRITION:** Children are eating more fruits and vegetables at lunch due to the updated nutrition standards in the Healthy, Hunger Free Kids Act.
- ANIMAL WELFARE:** Higher welfare standards for farm animals are also good for public health and the environment.
- DIVERSITY IN BUSINESSES:** Supplier diversity programs help counteract disparities in access to opportunity for diverse businesses, including ones that are owned by women, people of color, veterans, and people with disabilities.

### LEARN MORE!

**Food Service Guidelines for Federal Facilities:** [cdc.gov/obesity/strategies/food-serv-guide.html](http://cdc.gov/obesity/strategies/food-serv-guide.html)

**EXCEED:** The Tool for Using Healthy Food Service Guidelines: [exceedtool.com](http://exceedtool.com)



Learn more about the Good Food Purchasing Program at [goodfoodpurchasing.org](http://goodfoodpurchasing.org) and join our local campaigns at [goodfoodcities.org](http://goodfoodcities.org).



ChangeLab Solutions is a nonprofit organization that provides legal information on matters relating to public health. The legal information in this document does not constitute legal advice or legal representation. For legal advice, readers should consult a lawyer in their state. Support for this fact sheet was provided by the Robert Wood Johnson Foundation. The views expressed here do not necessarily reflect the views of the Foundation. © 2017 ChangeLab Solutions

[changelabsolutions.org](http://changelabsolutions.org)

## Indiana Grown for Schools

The Indiana Grown for Schools network envisions an Indiana food system that engages young people, farmers, educational settings, and whole communities in farm to school activities, to create a new generation of consumers. Housed on the Indiana Grown for Schools website (<https://www.ingrown4schools.com>), the Buyers Guide is a great starting place for finding producers who are interested in selling to schools and the products that they offer. The online version is up to date and interactive.

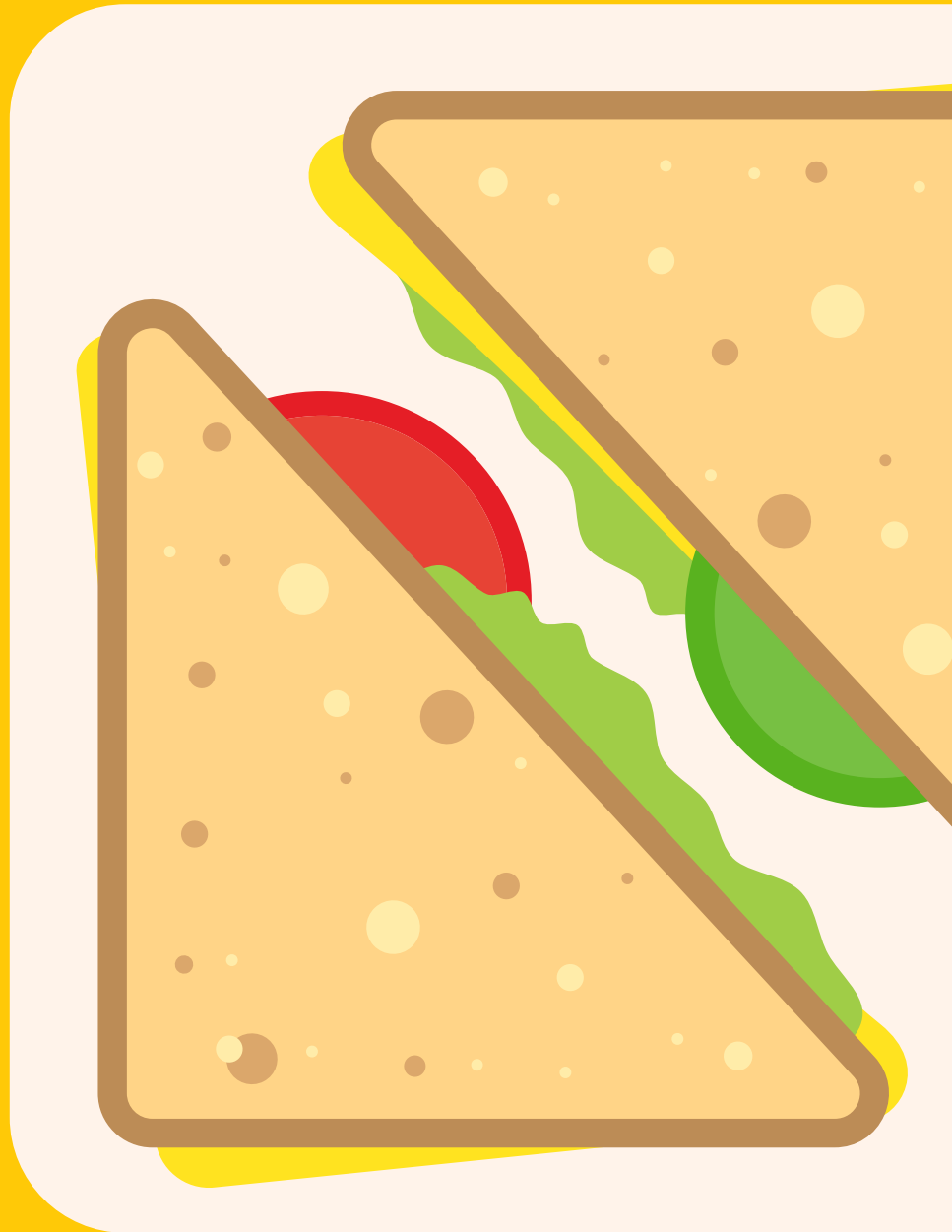
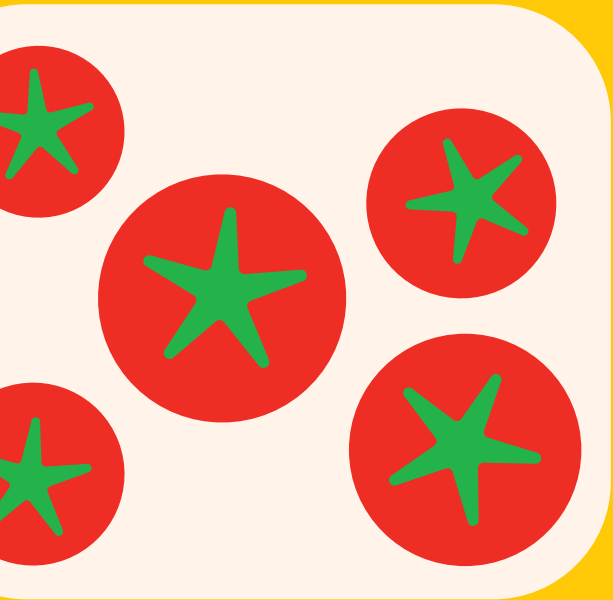
Additional resources exist on the IGFSN website for local procurement, including this toolkit, alongside resources for the three other pillars of farm to school: school gardens, ag and nutrition education, and farm to ECE. Technical assistance in programming, networking, and grant writing is all offered by the network and can be requested through the information box. As the home for the network, this website can provide you with resources that you need and places to connect for help.

## Local Food Councils

Indiana has a number of local food councils throughout the state covering identified geographies. These councils might serve a county, group of counties, or identified regions of the state, working to support their local food systems in a variety of ways. Food councils can be great resources for both producers/growers and buyers in the farm to school space, serving as bridges and connectors for both. Additionally, food councils work on issues that impact the value chain in their local areas, creating new projects, influencing policy, all while incorporating the viewpoints and lived experiences of the community members.







# Chapter 1: Buyers

# Why should buyers procure local food?

Procuring local food is beneficial for kids, farmers, and the community! In farm to school programs, kids can access nutritious, local food to increase their focus and support their learning in school. Additionally, they learn to develop independence when it comes to making decisions about cooking, nutrition, and health. Children are given the opportunity to establish lifelong nutritious habits that they can teach to the rest of their families and carry into adulthood. Farmers also benefit when buyers procure local food: farm to school can be a worthy financial endeavor for farmers and greatly increase their potential earnings. Farm to school programs can significantly enhance family and community engagement. When buyers purchase from local producers, this creates new jobs and helps to strengthen local economies and businesses.

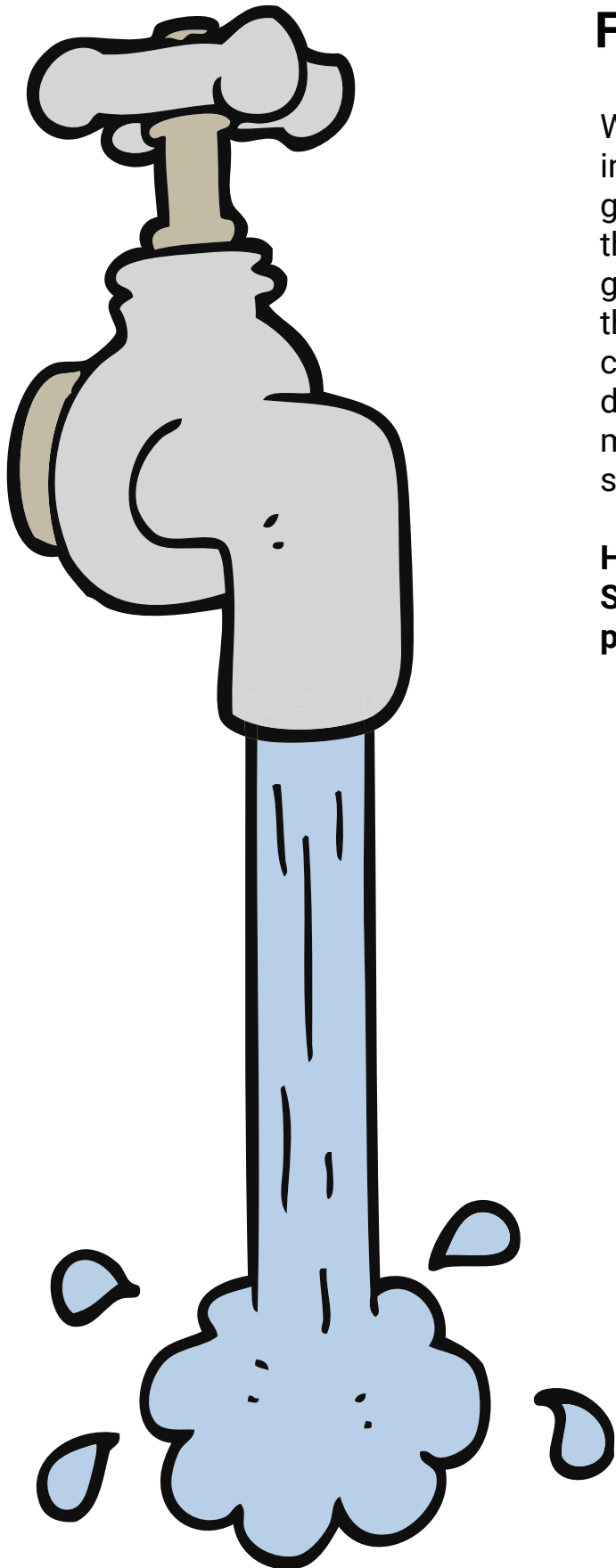
## Definitions

[In Appendix A](#), you will find a number of definitions that apply to the local purchasing space to provide clarity to any misunderstood topics, designations, types of sale, etc.

## Procuring Local Food for Child Nutrition Programs

Released by the USDA, [Procuring Local Food for Child Nutrition Programs](#), houses a great deal of information and examples. The toolkit goes through the different types of procurement, considerations, and special programs for procurement such as Farm to Summer.





## Food Safety Considerations

When purchasing local food it is important to consider food safety guidelines. The Indiana Food Code is the best place for overall food safety guidance. . For more specific questions that cannot be found in the Food Code, connecting with your local health department will provide you with the most accurate information for your specific locality.

**Here are a few tips shared by Food Service Directors engaged in local procurement:**

1. If you are buying local food from a distributor, it is coming from an inspected facility and follows needed guidelines
2. If you are procuring from a local producer/grower directly, it is best to talk with them and build a relationship. The more you can understand about their process the easier it is going to be to determine if there are food safety issues.
3. Visit your producer/grower. Seeing the growing and processing facilities are going to reinforce your ability to make decisions about food safety.
4. Meat has to come from an inspected processor facility, either USDA inspected or Indiana Board of Animal Health.
5. When in doubt, refer to your district policy and/or call your local health department.



# Templates

In Appendices B to H, you will find a variety of templates to use as guiding documents to help you get started in local procurement. Some sample templates included are logs for phone or small purchase quotes, scoring rubric, small bid solicitation letter, and an RFP.

While there are no state-level standardized templates for RFPs or scoring sheets, the aim of this Appendix is to provide examples for a variety of order sizes and school sizes. In addition to the templates themselves, the index provides many other useful resources.

**Insert Date**

**Insert name of school/district** Food Service Department is seeking price quotes for locally grown produce and food items for School year 2021-2022. Please complete the quote sheet and checklist for retail purchasing form. When filling out the quote sheet please include variety of item for example for apples, please list some varieties you would offer to us... gala, goldrush, etc.

Please note that we cannot purchase from you unless you are registered with the state food protection program. I have enclosed registration form and information on the Farm Produce Safety Registration Initiative. You may contact Joanna Beck for questions regarding registration 317-476-0056. You must also have taken GAP (good agriculture practices) training.

Please let me know if you have any questions regarding this program.

**Name**  
**Title**  
**Street Address**  
**City, State Zip**  
**Phone**

**Please submit quotes & Retail purchasing checklist by JULY 23.2021**

## Using Geographic Preference in a Solicitation

The federal regulations do not prescribe the precise way that geographic preference should be applied, or how much preference can be given to local products. There are a variety of ways to apply geographic preference and one way is not considered better or more effective than another. One approach is to award a percent preference or a certain number of points for products produced within the state. Another way is to use a tiered approach for awarding preference—for instance, awarding 5 extra points to vendors with products grown within the state, while awarding 8 extra points to vendors with products grown within 150 miles. Regardless of the approach used, the solicitation document must clearly outline how all bids will be evaluated, including the application of geographic preference in the scoring criteria.

The following example demonstrates how an SFA might use preference points in a solicitation for products. In this case, respondents offering a local product receive 10 geographic preference points, with each point translating to one cent off of the bid price. Therefore, if one or more of the responsive respondents with the lowest price meet the geographic preference, 10 cents will be taken off of their respective prices. (Note: Deducting 10 cents from the prices of responsive bidders that met the geographic preference only applies to determining the winning respondent and would not affect the actual price paid to the respondent.) In this example Respondent 2 meets the geographic preference and is awarded 10 additional points, which translates into deducting 10 cents from Respondent 2’s price. This makes Respondent 2 the lowest bidder.

	OWEN'S ORCHARD	APPLE LANE FARMS	ZOE'S BEST
Price	\$1.97	\$2.05	\$2.03
Apples within 100 miles of school	No	Yes (10 Points)	No
Price with preference points applied, for evaluation purposes only	\$1.97	\$1.95	\$2.03

*Apple Lane Farms meets the stated preference for local products and is awarded 10 additional points, which translates into deducting 10 cents from Apple Lane Farm’s price. This makes Apple Lane Farms the “lowest bidder.” The school still pays Apple Lane Farms \$2.05 for its product; deducting 10 cents from the price of responsive bidders that meet the geographic preference only applies to determining the winning respondent and would*

# Buying Local at Different Levels: How Do I Start & How Do I Grow?

Local procurement may sound intimidating, but it does not have to be difficult! It's important to note that local procurement does not require food to come directly from the farmer or producer-- there are other ways to procure local food, such as from a food distributor. By starting small and being intentional about where the food is coming from, it's possible for buyers to take steps to procure more local food over time.

## Beginner Local Procurement

If you want to begin a farm to school Local Procurement Program in your school or district, it is best to start small. Starting small could be taking on a one day event, like Apple Crunch or Indiana Local Food Day, or aiming to procure local food one time for a menu item in the cafeteria. One day events are a great way to bridge learning and collaboration from the cafeteria into the classroom. Ag and Nutrition education lessons can be taught and, depending on the product involved in the event, school gardening can be incorporated. This multi-sectoral approach to farm to school can happen on the beginner level and we encourage you to involve all parts of the building.

## Resources

### *Apple Crunch*

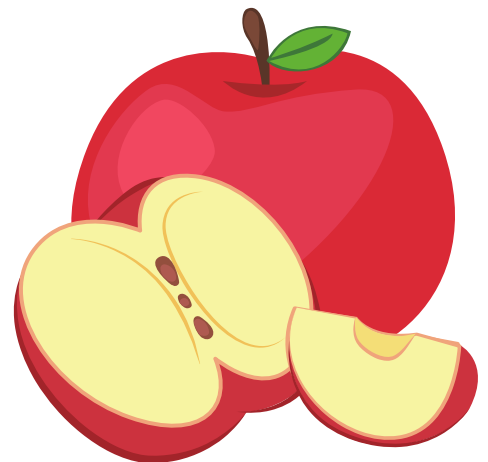
Apple Crunch or the Great Lakes Apple Crunch, traditionally happens in October during farm to school Month. This is a one day event where your learning environment would procure local apples and all crunch into them at the same time.

<https://cias.wisc.edu/applecrunch/>

### *Indiana Local Food Day*

Indiana Local Food Day is organized by the Indiana Department of Education and happens during farm to school Month each October. This event highlights a common Indiana product and is accompanied by a toolkit, providing resources, recipes and more to make your event successful.

<https://www.smores.com/93dek>



## Intermediate Local Procurement

Once your school has developed a solid foundation in local procurement, we encourage you to think about expanding. One of the best ways to do this is scheduled local days and/or targets for local procurement percentages on your menu. For example, you could feature one local product each week on the menu or one local product every other week on the menu.

One of the most popular ways to feature local food more often is on a salad bar, or in prepackaged salads. While much of the produce on a salad is grown during the summer and fall, items like lettuce have extended seasons and can be offered into colder months. Root vegetables also have extended cold weather seasons and can add new variety to salad bars during the winter months.

Another effective way to incorporate local foods into your menu is to participate in a Harvest of the Month program. Featuring one local product per month, this type of program allows for more advanced planning, comes with a variety of resources, and is easily integrated into the classroom. For more information on Indiana Harvest of the Month, [please visit the section below or click here.](#)

*Example menu from Minneapolis Public Schools*



Farm to School



Minnesota Thursdays

## Resources



### **Chef Ann Foundation**

The Chef Ann Foundation offers a variety of resources for school food service including recipes, equipment, professional development, and more. As a wealth of information and programs, we encourage you to look around on Chef's Ann's website for resources and information to support your farm to school journey.

<https://www.chefannfoundation.org/>

### **Foodservice Recipes**

New School Cuisine is the first-ever effort by public school cooks who wrote a hands-on cookbook for their peers. It is the only cookbook that is for school cooks, by school cooks; includes only kid-tested recipes; and features local, seasonal ingredients and farm to school resources.

<https://vtfeed.org/resources/new-school-cuisine-nutritious-and-seasonal-recipes-school-cooks-school-cooks>



A FARM TO SCHOOL PROJECT  
of NOFA-VT and Shelburne Farms

### **USDA Team Nutrition**

A collection of food service recipes for a variety of ages, groups, and focused foods all standardized and approved by the USDA.

<https://www.fns.usda.gov/tn/team-nutrition-recipes>



### **Healthy School Recipes**

This searchable database provides links to numerous recipes for nutritious school meals, all scaled for food service.

<https://healthyschoolrecipes.com/>



### **John Stalker Institute of Food and Nutrition**

From Framingham State University, the John C. Stalker institute has put together a great list of resources for healthy school-based meals.

<https://johnstalkerinstitute.org/resource/recipes/>



The John C. Stalker Institute  
of Food and Nutrition  
AT FRAMINGHAM STATE UNIVERSITY

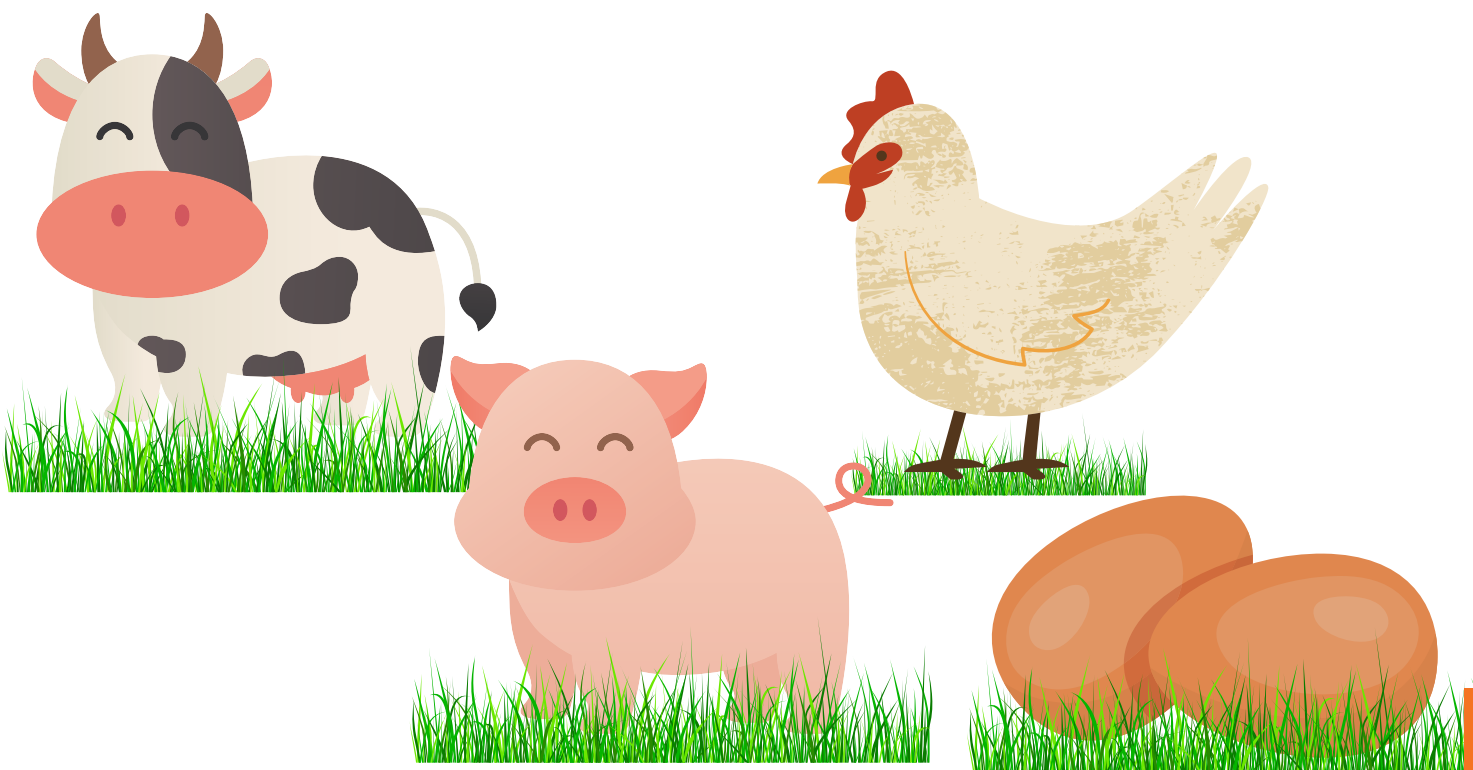


## Advanced Local Procurement

Once you are comfortable with procuring local items on a semi-regular basis, stepping into advanced local procurement practices can be a goal. At this level, participants may have a daily local menu item and/or very regular local food purchases. In the beginning and intermediate procurement levels, it is common to procure produce that is in season. In the advanced practice, one could plan ahead, procuring in season produce for later use. Extending the season of these local items can happen in the school cafeteria, or with a processor, to preserve the produce through blanching and freezing, flash freezing, etc. Extending the season does require more advanced planning and storage space, but is a fantastic option to be able to offer Indiana sweet corn in the middle of the winter.

Fruit and veggies are the most common items to procure locally, from a producer or through a distributor; however, at the advanced level, one could begin to more regularly procure meat and other animal based items. Meat does not need to be entirely processed at the school in order to be considered local; instead, schools and processors, in a joint partnership, decide if and how the meat should be prepared before it gets to the school. There are purchasing regulations for local meat that schools must keep in mind in procuring local meat.

This USDA published [Local Meat in Schools PDF](#) aids buyers in understanding the different methods for using local meats in schools and tips that might help make the use of local meat make more sense for your program.



## Harvest of the Month

Harvest of the Month is a nationally recognized program that features a specific seasonal local product in school meals, throughout agriculture and nutrition education programming, and sometimes in garden settings, within the learning environment for the duration of a month. This holistic approach is a very popular way to implement farm to school all over the country.

In Indiana, the Indiana Grown for Schools Network (IGFSN) recently launched an Indiana Harvest of the Month program. Unlike some other programs, this suite of resources highlights multiple foods per month and allows you to choose what local product to feature. These resources are supplied by IGFSN, Indiana University Sustainable Food System Science and the Northeast Indiana Food Council. We encourage you to explore the suite and reach out with questions.



## Local Food Across the Educational Setting

Food service can work to incorporate other pillars of farm to school into the learning environment, which may coordinate with the activities of the cafeteria - local food highlighted in teacher newsletters, in the classroom, bringing produce from local gardens into the classroom, etc. This integration across the learning environment strengthens the lessons learned in the cafeteria, keeps students engaged, deepens understanding and can encourage them to try new foods. Beyond the classroom, communication about what is happening within the building can influence family behaviors, supporting increased nutrition for all.

A fantastic way to begin is to talk about what you are doing in the cafeteria and why. Passion is easy to detect in professionals and explaining your passion with educators outside of the cafeteria can help them understand benefits of farm to school programming and how to develop a mutually beneficial relationship with the cafeteria.



## Resources

### **Ag and Nutrition Education Toolkit**

Written by the Indiana Grown for Schools Network, this Ag and Nutrition Education Toolkit aids educators in incorporating farm to school principles into their course work with games, lessons, and more!

<https://www.ingrown4schools.com/links/ag-and-nutrition-education-toolkit>

### **School Gardens Toolkit**

Written by the Indiana Grown for Schools Network, this School Gardens Toolkit is a step-by-step guide to planting, maintaining, and using your school garden.

<https://www.ingrown4schools.com/links/school-gardens-toolkit>

### **Farmer Trading Cards**

Farmer trading cards can be a great addition to the work you are doing in supplying local food within your cafeteria, snack times, and other meal programs. These cards feature local farmers that supply the food that the students are eating and can be incorporated into harvest of the month programming, farmer school visits, or a prize system for collecting them all.

Inspiration here! <https://myfarmlife.com/2011/farm-team/>

### **Virtual Farm Tours**

The Northeast Indiana Food Council and their partners have created a series of Farm Tours that correspond with products in their regional Harvest of the Month Program. Check them out at the link below!

<https://www.youtube.com/channel/UCIWROqMvz9iqbQrLzTLJEIlg/playlists>

Countyline Orchard has a virtual farm tour available with Indy Car driver James Hinchcliff! In addition to the tour, the orchard provides learning materials for pre-K to 5th grade.

<http://www.countylineorchard.com/school-tours/>

### **Indiana Dairy Association**

Indiana's leader in dairy, the Indiana Dairy Association has videos featuring Indiana dairy farms and their processes for getting milk from cow to table.

<https://winnersdrinkmilk.com/virtual-farm-tour/>

### **Ag in the Classroom**

The nation's leader in in-classroom ag and nutrition education, supplying lesson materials and more in their online platform.

<https://www.agclassroom.org/student/virtual/>

# Bartholomew Consolidated School Corporation

By: Nancy Millspaugh

Currently all 18 BCSC schools participate in our Farm to School Program. Each year the Food Service Department sends out price quote requests to area farmers for specified produce. In the past we have asked for quotes for locally grown apples, tomatoes, bell peppers, cantaloupe, cucumber, strawberries, kale, turnips, and watermelon, squash, etc. The farm must carry farm liability insurance for product purchases, be able to deliver the produce to our warehouse, be able to accept purchase orders for payment, and complete a checklist for retail purchasing of local produce.

We started this program 12 years ago when the economy took a turn for the worse. We felt it was important to support our local economy, farmers, as well as a way to provide fresher, healthier, tastier, produce to our students while lowering our carbon footprint. We also saw this as a nutrition education opportunity. Many students were unfamiliar with fresh produce due to economic factors that prohibited their families from purchasing fresh produce. We wanted to share with them the health benefits of healthy fresh food, and for them to experience the difference in taste of fresh, locally grown produce served in season. We provide nutrition education handouts specific to the locally grown produce we are serving that week. Also during National Farm to School Month (October) we have a local farmer visit our cafeterias during lunch time to distribute coloring papers, show a display of his produce and discuss the fresh fruits and vegetables with the kids. He was very well received and he said he felt like "a rock star for a day" by how excited the kids were to talk to him!

What we found in starting this program was an added economic benefit to our program. We found we could purchase the fresh locally grown produce at a much reduced cost than from our regular produce distributor. An example of this is we were able to purchase \$8.00 watermelons from our distributor but we could purchase locally grown watermelons for \$2.50! The same type of value was found for all the other items we used. The first year we found by purchasing locally we save \$4,000.00 on our produce bill for the fall.



Some of the drawbacks to the program are obvious and just need flexibility to deal with. Being Indiana, we only have a limited grow season so the program is not feasible as the only source of produce all year long. Also, we have experienced some of the worst drought conditions in history, and some years excessive rain, so some of the produce is not always available and/or it may only be available for a short time due to the weather. When planning the program there needs to be flexibility to substitute other locally grown produce in its place if this occurs.

Overall the program is very well received by students, staff and parents. I have had many comments from parents that they appreciate that their children are getting fresh, locally grown food. Students are eating the fresh produce well ... more so than canned fruits offered the same day. Café staff are proud to be serving healthy, fresh food to their students and like the idea that they are supporting our local economy in Columbus. We feel the Farm to School Program is a great collaborative effort between the school system and the community to better serve the students and residents of Bartholomew County.



Pictured, left to right: Maryellen Pollitt; Tracy Piehl, Director of Food Service Nancy Millspaugh, and Kelly McNicholas



## **Chapter 2: Producer**

## Why Is Selling to Schools Beneficial?

Selling your farm products to local schools can provide a consistent market with many rewards in addition to sales. The reasons that farmers around Indiana and the rest of the country choose to sell to K-12 schools are as diverse as the farms themselves. As you develop relationships with your local schools over time, school food service programs can provide a consistent market for products that they use on a regular basis. In addition to these benefits, selling your food to schools can have positive impacts on your local community through economics, health, placemaking, and community building (please see [pages 3 and 4](#) for more information). Feeding children with your fresh, nutritious foods encourages them to connect with their local farmers and food system from a young age.



### Benefits:

1. Once relationships are established, you can create a predictable, consistent revenue stream.
2. Opportunity for additional marketing (i.e. students, teachers, admin, parents can learn more about you and your farm which could help direct more business to your farmers market and other sales).
3. Support the community and know where your crops go.
4. Grow the next generation of customers and inspire a new generation of farmers.

## General Resources

### Bringing the Farm to School Toolkit

Another helpful resource is the Bringing the Farm to School Toolkit that has been developed by the USDA and the National Farm to School Network. There are several worksheets that can be helpful in planning an approach to school sales that is a good fit for the farm.

#### ***Bringing the Farm to School Producer Workbook***

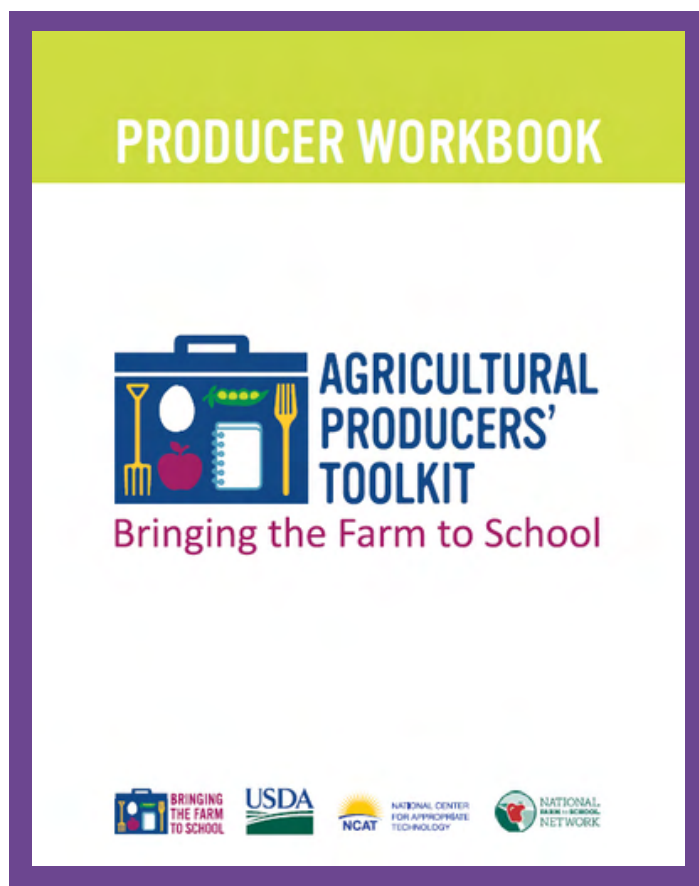
This resource supports the Bringing the Farm to School producer training workshops. These workshops may be offered in Indiana in the future, but in the meantime the workbook contains valuable resources, definitions, etc. that can help you understand the basics of school nutrition, procurement, and farm to school efforts.

<https://www.farmentoschool.org/our-work/bringing-the-farm-to-school-producer-resources>

#### ***School Business Action Planning Guide***

A useful tool from the appendix of the Bringing the Farm to School Workbook. This guide helps you understand if selling to schools is the right business move for you.

[https://assets.website-files.com/5b88339c86d6045260c7ad87/6144ba6ef10c456dbe883362\\_ProducerActionPlanningGuide.pdf](https://assets.website-files.com/5b88339c86d6045260c7ad87/6144ba6ef10c456dbe883362_ProducerActionPlanningGuide.pdf)



## General Resources

### Cornell Small Farms Wholesale Readiness Resources

The Cornell Small Farms Program has aggregated this list of resources that provide multiple perspectives and types of training support for successfully scaling up to wholesale. Ranging from webinars and one pagers to longer training options, there are resources for produce, meat, and value added producers.

<https://smallfarms.cornell.edu/projects/baskets-to-pallets/wholesale-resources/>

### New Entry Sustainable Farming Project Wholesale Resources

Global Growers, in collaboration with the New Entry Sustainable Farming Project, developed this series of one pagers and training manuals to assist immigrant growers with the expansion of their farms. The one pagers and trainings are designed to help farmers understand what they need to do to successfully transition to wholesale markets.

<https://nesfp.org/resources/wholesale-readiness>

### Wholesale Readiness and Direct Market Success Manuals

Family Farmed and Attina Diffley have developed manuals on wholesale readiness [Wholesale Success] and direct sales [Direct Market Success]. These manuals are fantastic introductions and tools for thinking about whether bulk/wholesale is a good fit for your farm.

<https://familyfarmed.org/farmer-training/>

### USDA Selling to Local Schools Fact Sheet

USDA's one-page guide and high level overview about selling to schools.

<https://fns-prod.azureedge.net/sites/default/files/f2s/SellingLocal.pdf>





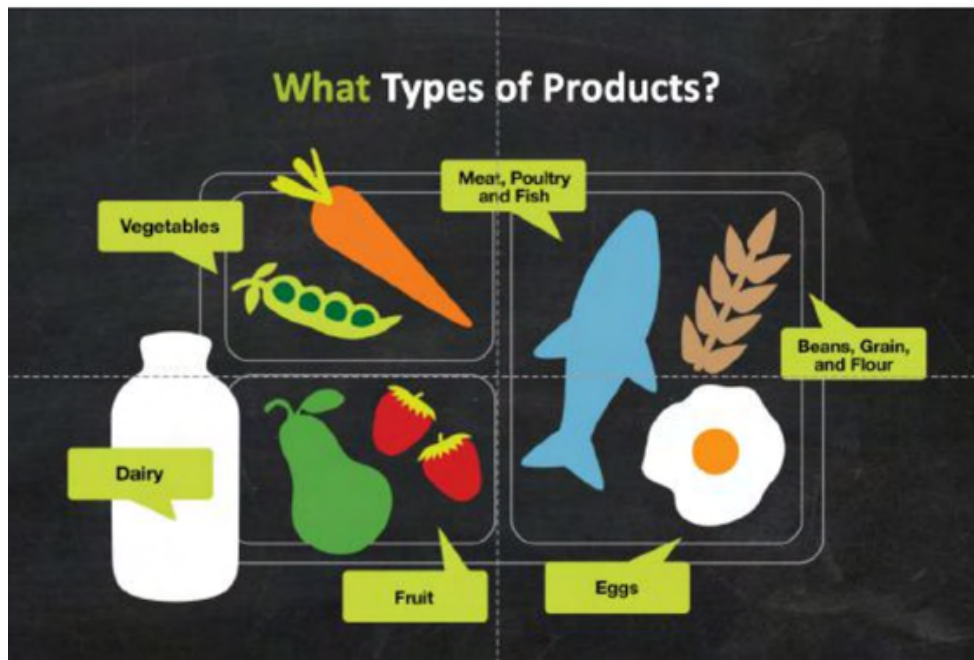
## What Do Schools Expect From You?

Though many school districts and Food Service Directors may have a desire to purchase foods locally because they recognize the importance of supporting local farms or the value of purchasing fresher items, they may be new to purchasing directly from food producers. Many schools may be accustomed to purchasing from a broadline supplier, and some may work with a food service management company. Though it can be challenging at first to work with buyers that are accustomed to large product catalogs and streamlined invoicing and delivery, building relationships over time and listening to the needs of the schools you would like to work with can help to break down barriers.

### Understanding School Lunch Program Guidelines

While there are slight differences to each school meal program, there are nutritional guidelines that they all must follow: they all must contain milk, grains, protein, fruits, and vegetables. Each school's Food Service Director can choose how to procure these components - they can come from local sources or large distributors. Within each of the five main components there are requirements. If you are able to meet the requirements below, it is best to market yourself on those points.





**Milk:** Fat-free or low fat (1%)

**Grains:** half of the grain products served must be “whole grain rich,” which means that it needs to be greater than 50% whole grain. All other grain products must be enriched. If you are selling a grain product, it is important to communicate and label that the product is more than 50% whole grain.

**Fruit:** limited juice (offer whole fruits)

**Vegetables:** Weekly vegetable sub-group requirements, 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-eyes 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



## Understanding Product Sizing and Grading Needs

The size of the school you are selling to and the type of meal program they plan to use the food in are going to greatly affect the amount of product they need. It is important to understand these factors and what a program needs to determine if it is a good fit for you and your product. Below is an example of how that might look different across different settings.

CNP Setting	Serving Size	Number of Meals	Pounds Needed
Large K-12 District- Plated Lunch	¾ Cup	350,000	108,150
Medium K-12 District- Plated Lunch	¾ Cup	5,000	1,545
Small K-12 District Fresh Fruit and Vegetable Snack	½ Cup	500	102

Adapted from *Bringing the Farm to School, Producer Workbook*, Page 9 (<http://www.farmtoschool.org/BringingF2S/ProducerWorkbook.pdf>)

## Peer Collaboration

When getting started with selling your farm products to schools, it can be helpful to identify who else in your community is already selling to schools, whether there is a hub or similar business in your region that can assist with aggregation or distribution, and whether there are any kitchens or food businesses that might be interested in minimally processing your products to extend their availability throughout the school year. It is also a good idea to see if there are schools or farms in your area that are particularly successful in farm to school procurement and sales in your region and talk to and learn from them. If you are having difficulty identifying these people and resources in your community, your local food council or the Indiana Grown for Schools Network is a great place to start.



## Cooperative Production and Marketing

One option for lowering your barriers to selling directly to schools is to work with other farmers to cooperatively produce or market your products. By working with other farmers, you can improve the consistency of your supply and have additional options for filling orders in the event of crop failures from weather events, pests, etc. Grower cooperatives also allow you to emphasize the strengths of each individual farm(er) and can help you to diversify your product offerings (e.g. Grower A may grow a lot of carrots, while Grower B has an abundance of squash each season). Cooperative agreements can be formal or informal, small or large, and should be farmer driven. For farmers who are new to the farm to school space, working with a farmer more experienced in this space can provide additional opportunities for mentorship and learning best practices. For others, working together to aggregate products can open up the possibilities for larger accounts and sales. Regardless of what your cooperative agreement looks like, you should always talk to the schools you hope to sell to before expanding your production to make sure that the product you hope to sell is in demand and that the variety you choose to grow will work for the school (some schools and institutional kitchens use specialized chopping equipment that reduces labor, so they may need produce to be harvested at a certain size).





## Using Food Hubs or Distribution Partners

Before selling to schools, it is important to consider how you will get the food to the school. Will you be making your own deliveries? If so, are you able to accommodate the school's schedule? If you are interested in selling to schools, but don't have the capacity to make deliveries, working with a food hub or other distribution partner can be a great alternative. Food hubs/distributors also provide the benefit of your product being listed with a larger, more diverse product offering. School buyers have the added benefit of more streamlined ordering, invoicing, and delivery, which can lower their barriers to buying locally produced food. You may choose to reach out to schools independently to introduce yourself and your product and then direct them to purchasing through the hub. Others may rely upon the sales and outreach of the hub/distributor to manage school relationships. Like co-operatives, hubs and distributors can range from very small to very large. As a general rule, larger distributors may require more food safety documentation or certifications to be listed as a producer in their catalog, and may require certain scales of production. Small and mid-scale hubs/distributors that have a narrower geographic delivery range may be more willing to work with smaller scale producers. Each hub/distributor is likely to have different requirements, but nearly all will have some requirements for demonstrating attentiveness to food safety and post harvest handling.

### **Small:**

[Fischer Farms](#)

[Fresh Local Food Collaborative](#)

[Hoosier Harvest Market](#)

[Hoosier Harvest Market Southeast](#)

[Plowshares Co-Operative Food Hub](#)

[Region Roots Local Farm and Food Hub](#)

[Rose Hill Farm Stop](#)

### **Medium:**

[Piazza](#)

[What Chefs Want \(Creation Gardens\)](#)



## Food Safety and Wholesale Readiness

Understanding what is required of you, the producer, to sell into schools and other institutions can be challenging at times. Some producers say that they have heard different things depending on who they talk to, which can feel confusing and frustrating, especially when you are first getting started. In Indiana there are certain guidelines and minimum requirements at the state level that all producers must follow, but counties and individual school districts can implement their own supplemental rules and guidelines. This is why it is so important to start conversations with schools you would like to work with as soon as possible, so that you are sure you are meeting their requirements for food safety and procurement. It is also a good idea to introduce yourself to the local health inspector in the counties you are working in. In this section, we will provide an overview of what is required of all producers selling to schools in Indiana, as well as an introduction to some of the other things that individual counties or districts may ask of you.



While there is some information in this Indiana Grown for Schools Procurement Toolkit, it is important to note that Indiana is a home rule state. This means that local health departments, schools, and food service management companies may have additional requirements. Please reach out to your local health department for more information.

- Most schools require PSA Training (Produce Safety Alliance) to demonstrate awareness of best practices for food safety. According to state guidance, this is recommended, not required-- but it is a good idea and can help you demonstrate your commitment to providing a safe high quality product.
  - For more information about produce safety alliance trainings and food safety, check here:  
<https://ag.purdue.edu/extension/safeproduce/Pages/default.aspx>
- Please note that completing PSA training is a separate process from undergoing a third party Good Agricultural Practices (GAP) audit. The distinction between PSA training and GAPs audit/certification is not always clear to schools. GAPs audits are NOT required by the state-- PSA training IS recommended. However, some distributors and/or schools may have additional requirements in place (e.g. Piazza requires GAPs certification of its producers.)
- While this is not required, state guidance recommends that producers register as a wholesaler with the state.
  - For more information, please visit:  
<https://www.in.gov/health/food-protection/wholesale-information/starting-a-wholesale-food-business-in-indiana/>

## Food Safety and Wholesale Readiness



- Creating an on-farm food safety plan is a good practice and can help you to establish systems that are in line with GAPs requirements. Having evidence of these practices in a written plan can be thought of as a middle ground between PSA Training and paying for an annual GAPs audit.
- FSMA compliance is required. Please consult the FSMA flowchart to determine whether you are FSMA exempt or not. Non-exempt farmers must comply with FSMA inspections and requirements administered by ISDA and IDOH. ALL farmers, regardless of whether they are exempt, should adhere to FSMA standards to reduce chances of food borne illness (i.e. water testing, post harvest handling, etc)
  - [https://sustainableagriculture.net/wp-content/uploads/2016/02/2016\\_2-FSMA-Final-Rule-Flowchart-V3.pdf](https://sustainableagriculture.net/wp-content/uploads/2016/02/2016_2-FSMA-Final-Rule-Flowchart-V3.pdf)
  - For more information on the Indiana administration of FSMA compliance, check here: <https://www.in.gov/health/food-protection/farm-produce-safety-initiative/>
- It is recommended that producers also procure liability insurance to protect themselves and their livelihoods in the unfortunate event of a food borne illness. Some schools and distributors may have specific liability insurance requirements.

## Selling to Schools at Scale

Selling to schools does not require large changes to prices to be competitive in the school market. Food Service Directors and other buyers who are interested in procuring local food have scoring sheets to weigh the different aspects of the bids they receive in response to a Request for Proposal/Request for Quote. While price is always the highest ranked component, where the food comes from, delivery schedule, quantity, packaging specifications, etc. can all be parts of a scoring sheet and therefore influence what bidder comes out with the contract.

### ***Using Geographic Preference in a Solicitation***

The federal regulations do not prescribe the precise way that geographic preference should be applied, or how much preference can be given to local products. There are a variety of ways Food Service Directors apply geographic preference and one way is not considered better or more effective than another. One approach is to award a percent preference or a certain number of points for products produced within the state. Another way is to use a tiered approach for awarding preference—for instance, awarding 5 extra points to the vendors with products grown within the state, while awarding 8 extra points to vendors with products grown within 150 miles. Regardless of the approach used, the solicitation document must clearly outline how all bids will be evaluated, including the application of geographic preference in the scoring criteria.



The following example demonstrates how a school food authority might use preference points in a solicitation for products. In this case, respondents offering a local product receive 10 geographic preference points, with each point translating to one cent off of the bid price. Therefore, if one or more of the responsive respondents with the lowest price meet the geographic preference, 10 cents will be taken off of their respective prices. (Note: Deducting 10 cents from the prices of responsive bidders that met the geographic preference only applies to determining the winning respondent and would not affect the actual price paid to the respondent.) In this example Respondent 2 meets the geographic preference and is awarded 10 additional points, which translates into deducting 10 cents from Respondent 2's price. This makes Respondent 2 the lowest bidder.

	OWEN'S ORCHARD	APPLE LANE FARMS	ZOE'S BEST
Price	\$1.97	\$2.05	\$2.03
Apples within 100 miles of school	No	Yes (10 Points)	No
Price with preference points applied, for evaluation purposes only	\$1.97	\$1.95	\$2.03

*Apple Lane Farms meets the stated preference for local products and is awarded 10 additional points, which translates into deducting 10 cents from Apple Lane Farm's price. This makes Apple Lane Farms the "lowest bidder." The school still pays Apple Lane Farms \$2.05 for its product; deducting 10 cents from the price of responsive bidders that meet the geographic preference only applies to determining the winning respondent and would*

## Beginning to Sell to Schools (single sales, micro-sales):

- Farmers looking to engage in direct sales will likely need to spend time developing relationships. Farmers can sell the value of local and emphasize freshness and quality. One benefit to purchasing food harvested within a couple of days of delivery is that schools may see less “shrinkage” (product spoilage).
- Farmers with an interest in cultivating community may also be interested in classroom visits, farm tours (or tour recordings), etc.
- “Events” like apple crunch or a carrot tasting may be an additional strategy for securing a micro purchase and establishing successes from which to build.
- For other farmers, indirect sales (e.g. through a hub) may be a better strategy- particularly if they do not have the bandwidth for classroom visits, tours, or relationship building. Farmers seeking this path should identify who the school currently buys from and/or which other local companies are able and willing to work with local farmers. If you are in need of assistance [please contact Indiana Grown.](#)
- Identify what a school’s needs are for ordering (e.g. online, text, invoicing, etc), delivery (which days), and storage. Some schools may not have much space and may need deliveries more than once a week.



## Beautiful Edibles

In the summer of 2019, Mary and Roger Winstead, owners of Beautiful Edibles Grow in Paradise, Indiana, worked with the Welborn Foundation, a non-profit organization in their area, to facilitate an introduction to their county school system. After the initial introduction, the Winsteads set up a tomato tasting event for the Food Service Director. The school staff was excited to offer multi-colored vegetables and planned to use the tomatoes in kabobs and veggie cups, and the Winsteads agreed to send weekly availability lists in fall 2019, and make deliveries to each school in the district. Mary Winstead said, "We loved that we were feeding children in our own community." The Winsteads did note some lessons they learned in that first season though.

- Because they were introduced in the summer, the Winsteads had not planned for the volume of tomatoes the school district needed. They were able to work with another local farmer to meet the needs of the school. It's helpful to start these conversations as early as possible to allow for crop planning.
- The food service staff said they were unsure if the non-red tomatoes were eaten because they were unfamiliar. It would be helpful to track student preferences in the future, or to consider spotlighting new items so students are excited to try them.
- Delivering to each school presented some challenges because of the amount of driving. The Winsteads noted that in the future, they would prefer to divide up the county and the two partner farms could deliver to the schools closest to them.
- In 2020, the school decided to stick with a distributor for their purchasing. The Winsteads are hopeful that the development of a new food hub in the area will make it easier for farms to aggregate and sell to schools, and possibly lower the barriers for delivery.



## Intermediate Sales to Schools (building relationships, selling on a schedule, crop planning)

- Once relationships are established and a school is purchasing more frequently, farmers may consider talking with Food Service Directors about their purchasing needs in the “off” season. The winter season coincides with contract negotiation time for many schools, so this is an excellent time to have discussions about what a schools’ purchasing needs are projected to be for the following year.
- Identifying co-packers or others that can minimally process (e.g. flash freeze) produce in the harvest season can allow farmers to sell their product year round in spite of most schools being out of session in the summer.
- Most schools must do 80-90% of their purchasing through their existing contracts- knowing this is important, but it does not have to be a barrier. 10-20% still leaves a lot of room to include local producers.
- Seek regular feedback to see if you are meeting the needs of your partner schools.





## Advanced Sales to Local Schools (multiple schools and accounts, selling meat, long-range planning for buyer needs)

- Produce is an entry point for many schools, but there are opportunities for meat, eggs, dairy, and value added products as well. It is important to be aware of state and federal guidelines here before you begin conversations with the school.
- Meat can be particularly tricky- some schools no longer have the equipment (or labor force) needed to cook from scratch. As a result, they may be looking for pre-portioned or par-cooked meat items (e.g. burger patties, chicken nuggets, etc).
- Managing multiple schools can be challenging if you have additional sales venues. In this case it may make sense to work with other farmers or a local distributor/hub to ease the logistical burden and better ensure consistent product availability. For example, if weather or pest conditions wipe out a crop, you may be able to work with a partner farm to still fulfill your orders.





## Fischer Farms

We at Fischer Farms have been selling to K-12 schools over the past few years. We raise and supply natural, premium, sustainable meat raised on our family farm in Indiana to wholesale foodservice and retail customers. Students and parents have become increasingly interested in where their food comes from and the quality of their meals. This interest has paved the way for local producers to enter the conversation.

While each school corporation is unique, K-12 schools generally present challenges to local producers due to their high volumes of easy-to-prepare products at low price points due to budget and kitchen limitations. These challenges require emphasis on the “story of local” and differentiation from conventional suppliers. Alignment on logistical details requires collaboration to align producer capabilities with school requirements (order/delivery days, product specs, packaging, volumes, etc.).

Successful partnerships result in positive impacts in and out of the kitchen. Farm fresh meals with a story parents are happy with and kitchens are proud to serve. Students learn firsthand about local agriculture and how the food they eat is produced.





# **Chapter 3: Administration Support**

For many Food Service Directors, support from the school and district administrators is vital to the success of their program from beginning stages to advanced practices. In this section we explore how administrators can best support their Food Service Directors, as reported by individuals in the role, and the importance in doing so.

As discussed in other sections of this toolkit, the procurement of local food can increase the nutrient density of foods offered in the cafeteria, increase community connectedness and support local economies. Promoting new foods in greater variety and closer to the source aids in increasing the intake of vital nutrients of students. Students who are supported with nutritious diets have demonstrated increased attention spans and learning retention.

While balancing budgets is vital, it is important to remember to balance factors such as nutrition, learning opportunities, connectedness, and more when discussing local procurement. Having a holistic view of the budget and the purpose it serves, enables FSDs and administrators to focus on procuring local food.



## How to Support Local Procurement

One of the best ways to support your Food Service Director in their pursuit of local food procurement is to allow them space to talk about their ideas and to support innovation. Listening to the ideas of the Food Service Director, allowing them to present to you and other administrators, and building up that relationship is a free way to support them through the process. The most successful programs have a foundation of understanding and trust between levels of leadership.

Integrating local food procurement into school wellness policies is not only a sign of support, but aids in the longevity of the program. Adding local procurement, among other farm to school programming, to the school's wellness policy demonstrates to faculty, students and parents that supporting local economies, providing nutrient dense foods, and fostering an immersive learning environment is important to school officials.

## School Board Support

Similar to administrators who serve in the schools each day, School Boards can support Food Service Directors by allowing them to present at meetings to talk about what they do and why they do it. Passion for local procurement not only benefits the students in the cafeteria, but the producers in the community. Demonstrating a strong commitment to a thriving community, as part of a thriving school system, gains further support.

Schools with gardens that want to use products in schools can be supported by the passing of food safety plans by the school board to allow the consumption.





# **Chapter 4: Community Engagement**

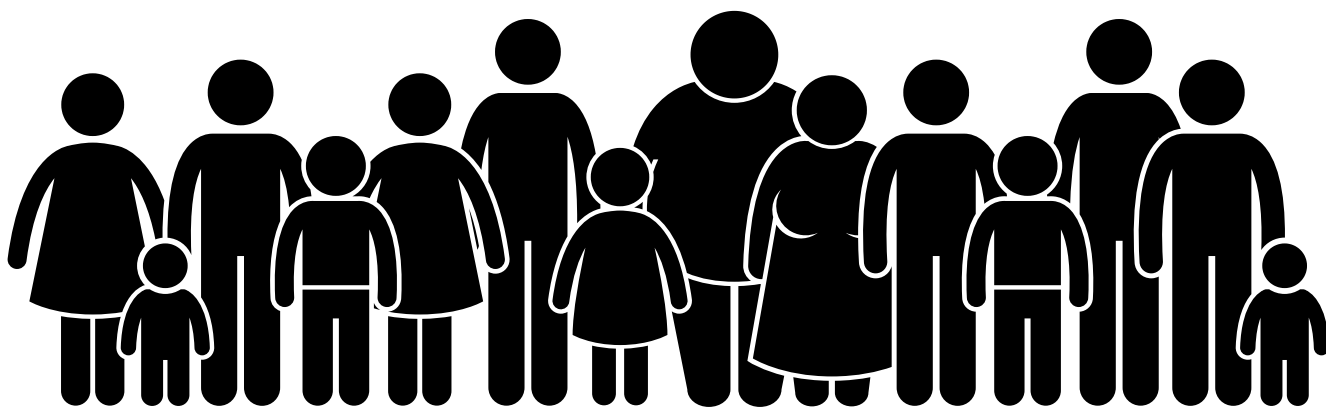


## Why engage community stakeholders?

Farm to school requires collaboration with the community, and, when done properly, benefits everyone within the community. Local food procurement can provide students access to more nutritious school meals and can advance income generation and access to land ownership for producers. The following are positive effects from community engagement:

- Improved support and acceptance of more nutritious school and early care and education meals among parents and the community.
- Promotes positive linkages between schools and communities, particularly in low-income communities and communities of color.
- Increased student appreciation for and knowledge of diverse cultures and customs as well as engagement of diverse families in school activities.
- Increase in opportunities to combat racial and economic inequities in the school food system.
- Begins to reduce racial and social inequities in educational opportunities through access to experiential learning, resulting in higher student test scores.
- Promotes environmental equity and links concepts of sustainability to social justice.

To learn more about the positive effects from community engagement, please visit: <https://www.farmtoschool.org/Resources/BenefitsFactSheet.pdf>



# How to engage community stakeholders

There are many ways to engage various parts of your community in your farm to school efforts. Farm to school organizers can look to farmers/producers, the PTA, and community partners to boost the program.

## Farmer/producer engagement

When farmers and producers engage in farm to school programs, it can promote excitement for local farming and increase the success of the programs, while improving health and increasing equity. The first way that farmers and producers can engage is by allowing field trips (virtual or in-person) to the farm. This will allow students to see the produce, understand the growing process, and feel more connected to their food. Additionally, farmers can come into the classroom to speak to students directly about local farming. They can discuss topics such as seasonality of fruits and vegetables, nutrition, and how to grow foods. This can inspire excitement for local foods and a desire to eat the foods they learn about. Another way of drawing attention to where local food is coming from and highlighting local farmers is farmer trading cards. Similar to baseball cards, these cards feature a picture of a local farmer on the front and more specific information on how and where to buy the food on the back. In this way, it will be mutually beneficial for the farmer and the school: the students will know more about local farming and feel more connected to these farmers, and it is a great way for farmers to advertise to the community, which will hopefully result in increased sales.

## PTA/Parent Organizations

In the way that PTA and parent organizations have the power to determine important decisions about funding and homework, they also can raise awareness about the importance of local procurement. They can achieve this goal by bringing up benefits of local procurement during meetings, fundraising to appropriate more money to farm to school programs, purchasing equipment (such as salad bars stocked with local fruits and vegetables), volunteering for a one day event (such as Apple Crunch), and by informally getting the word out. Additionally, local food could be served at PTA events.

## Engaging Community Partners

It's also beneficial to engage partners in the community. There are many items that can be donated to support farm to school programming within schools. Egg boxes are very helpful and can be used to start seedlings. On top of physical items, manual labor can also be donated to offset costs. For instance, Dan Peters, a local farmer, donated his equipment and time to help students build a shelter for the cattle in Tippy Valley's Beef Program. This donation of time and money saved then enables the budget to be expanded and spent in other ways.<sup>10</sup>

Technical assistance is another valuable asset that can benefit local procurement. Indiana Grown for Schools Network has a [technical assistance portal](#) on the website. In addition, you can talk to the Indiana Department of Education about the rules and regulations of local procurement. Technical assistance can also be provided by value chain coordinators, who can help to procure more local food, work through issues with farmers/buyers, and more. For information about value chain coordinators, [please click here](#). Purdue Extension, the outreach link between local communities, the land grant universities, and the United States Department of Agriculture (USDA), is another resource for local procurement that is located in all 92 Indiana counties. This promotes the well-being and productivity of people throughout the United States.

For more information, you can visit:

<https://extension.purdue.edu/4h/Shared%20Documents/4-H%20Council%20Handbook%20Tip%20Sheets/Purdue%20Extension%20Overview%20Tip%20Sheet.pdf>.



## Engaging Your Agricultural Education Department

Schools have the option to engage their agricultural education department with the purpose of promoting agricultural and nutrition education. These teachers can provide lessons about animal science, plant and soil science, and ag business, among others. These teachers can highlight the harvest of the month programming if appropriate. Additionally, a class can take care of gardens and care for animals that the program is raising. This facilitates student involvement in local food procurement and strengthens students' connections to the food they're eating.



## Engaging 4H and FFA

Future Farmers of America (FFA) and 4-H are two organizations within Indiana that provide connections to the growing, raising and cultivating of products used in all aspects of life. While some schools are engaged with these organizations, those who are not might find value in engagement. It can be incredibly beneficial to foster relationships that can enable more local procurement, ag and nutrition education, and gardening programs. For instance, school involvement in these organizations has given rise to partnerships for the cafeteria with family farmers.



FFA gives members hands-on experience in agriculture and prepares its members for careers in production farming, teaching, business, and more. For more information, you can visit:

<https://www.ffa.org/>

4-H teaches about healthy eating, growing and making your own food, and more.

For more information, you can visit:

[https://4-h.org/.](https://4-h.org/)

## **Paoli Community School Corporation Cory Scott and Kyle Woolston**

Nearly 8 years ago, Cory Scott, of Paoli Community School Corporation, was ready to do something different with his animal science class. Teaching the topic of animal science and not having hands on learning experiences was causing frustration and a desire for change in the way he taught the topic. His son was raising pigs for 4H and posed a question that would change the way Cory ran his classroom: “why do we always sell the pigs and then buy more?” It is a good question- they had female pigs they could breed, not just at home, and maybe the kids at school would be interested.

Scott approached the school leadership and asked if he could bring a pig to raise at school- they agreed to the idea and left the logistics up to him. He began raising the pig in the greenhouse, breeding her for offspring- and the students went wild. Because she was to deliver over Christmas break, the group installed a live webcam so students, families, and community members could watch at home. The new babies from the pig were sold to local 4H members to raise and show or found homes on local farms. Due to the large success of the project, the class bought two of the offspring to continue to raise and their original pig found a new home on a local farm.

After another year of the project, the one daughter (gilt) found a home, but they could not find someone to take the second. At this point, Scott decided to process her and serve her in a BBQ meal at school. All of the leaders involved in the project were nervous that the students would not want to participate in the meal, as they had known and cared for the pig her whole life. The exact opposite happened- and the farm to cafeteria part of their program was born.

In the years to follow, the pork program kept expanding and they needed and larger, more pig-friendly space. In the 2018-2019 school year, the students set out to raise money to build a pig farm at the school. Raised by students alone, \$215,000 was collected in 5 months for the construction of the barn, which was built the following summer. With the expansion, the pork program can now hold 6 pigs on campus, though there are 14 total females that they are breeding as part of the program (some community farmers are raising them, and they are treating the program like a cooperative).



## Success Story

In addition to the animal science side of the agriculture education program at Paoli, there are class offerings in ag business and plant and soil science. Kyle Woolston, Scott's partner teacher who was teaching plant and soil science, wanted to get in on the action of farm to cafeteria and began growing crops on the school campus with his students. Growing lettuce, tomatoes, and more, the class now sells their products to the school cafeteria as well.

The farm to school program run by Scott and his co-teacher is set up as a business entity so they can sell their products to the school, restaurants, and some local markets. Because of this unique model, the students in the ag business class aid in the running of the business, gaining hands-on experience and lifelong lessons in business management and fulfilling their graduation pathways requirements.

For selling to the school, Paoli FFA works with [Sander Processing](#) (Celestine, IN) to process the pork, as they are a certified processor for schools. The fruit and vegetables must leave the farm/garden minimally processed and be processed by a certified kitchen, which the school does have. These internal and external partnerships allow the students to consume the foods that they spend a great deal of time growing and producing.



## Success Story

Since the beginning of the program 8 years ago, retention across the ag education classes at Paoli has dramatically increased. Students are more engaged in the material because they have hands-on learning experiences, and many of the students enroll in two, if not all three of the ag education disciplines. The increased retention has allowed the educators to delve deeper into the content because students come in with a basic understanding. This year the school implemented a Certified Veterinary Assistant program at the school as part of their farm to school program. This program allows students to graduate with a job ready certificate in the field of veterinary science.

Beyond the classroom, the buy in can be seen across the community. From raising \$215,000 dollars in five months to students coming in on farrowing night to participate, going home to shower, and then coming back for the school day, students and community members are invested in the process and success of this farm to school program. Community members engage in the whole process through the [Paoli FFA Facebook page](#) and pig app, where they can watch the pigs any time they want. On farrowing nights, hundreds of people tune in from their phones to be apart of the farm to school program at the school.



# Case Study:

## Fresh Local Food Collaborative



Fresh Local Food Collaborative (FLFC) is a Food Policy Council (FPC) working through community partners to connect consumers to local producers and grow awareness about sustainable practices. Our 501(c)3 utilizes Farm2Table and Farm2School activities to accomplish their strategic goals of encouraging new farmers to consider Agriculture as a post-secondary degree or career choice.

The outreach to 10 school districts over four counties during the 2020-21 SY was supported, in part, by our USDA Farm2School award and allowed us to implement our three-silo approach from the pilot phase at Rising Sun-Ohio County Schools into nine new districts. These efforts allowed FLFC to present a monthly Harvest of the Month item as a planned menu item, create a network of 27 indoor aquaponic gardens, and finalize plans for procurement that will begin with the 2022-23 SY for at least 17,000 students in 23 buildings.

For the Harvest of the Month program, we hosted August, cucumber; September, watermelon; October, apple; January, sweet potatoes; February, frozen beef patties; March, frozen corn; April, spinach. Our goal is to source from our service area of Dearborn, Franklin, Ohio, and Ripley counties, but FLFC did forge new relationships this year. Through our community partners Food and Growers Association (FGA) [www.foodandgrowers.com](http://www.foodandgrowers.com) and Hoosier Harvest Market (HHM) [www.hoosierharvestmarket.com](http://www.hoosierharvestmarket.com) we connected with Engelbrecht's Countryside Orchard <https://engelbrechtsorchard.com/> in Evansville to compensate for a regional shortage from an early warm snap followed by a freeze. This sourcing outside of our network allowed us to be sure all ten school districts were able to participate in the Great Lakes Apple Crunch <https://cias.wisc.edu/applecrunch/>. We also learned about Souder Farm in Decatur County, IN <https://souderfarms.com/> this year. Their commercial freezing operation gave us great piece of mind for food safety. For cucumbers, watermelon, sweet potatoes and spinach, we worked with Dearborn County and GAP certified Lobenstein Farm <https://www.facebook.com/Lobenstein-Farm-115504615177718/> to supply.



**Procurement Bidding process:** After learning that Indiana state-level experts with the Department of Health and Department of Education were not allowed to assist our procurement efforts without causing a conflict of interest, we leaned on our community partners that already execute procurement at Green Umbrella <https://greenumbrella.org/> for guidance on the technical aspects of writing the bid requests. They were able to share what helped them be successful writing bids for the Cincinnati Public Schools. We also learned seven of our ten schools work with West Indy Coop <https://westindycoop.com/> and were able to learn from her how she had been successful writing bids in the past.



During our work this year, we polled all ten schools for weekly usage on cucumber, watermelon, peppers, tomatoes, cherry tomatoes, and zucchini and quickly learned the current demand exceeds production of known producers. Armed with this data, all three organizations can now collaboratively crop plan with producers for next year and recruit new producers to the network to ensure we always have a backup producer to minimize or eliminate product outages. No longer are we asking farmers hypothetically if they would grow for the schools. The time has finally come to offer purchasing trends to plan a new stream of income on each contracted farm. This is a huge win for agriculture in the southeastern corner of Indiana!

**Local foods to be used:** cucumbers, cherry tomatoes, #1 tomatoes, watermelon, bell peppers, cantaloupe, beef, and frozen corn.

Over the winter of 2021-22, we'll continue working with FGA and HHM to produce the documents necessary to implement procurement in our school cafeterias, crop plan, and aggregate to accommodate this new local demand serving the schools. Working collaboratively, we can maximize the resources of refrigerated delivery vans and personnel otherwise sitting idle to connect local food with thousands of children safely. We expect to work through the paperwork process in the spring of 2022 in preparation for weekly delivery for the 2022-23 SY to at least these ten districts.



**Rising Sun School System, Foodservice Director:**

Faye Bruce and Teresa Scott.

<https://www.risingsun.k12.in.us/>

Number of students: 757

Farm2School success story: Beginning in 2016, FLFC offered monthly local food tastings here as the Harvest of the Month program developed. It wasn't formal and depended on how much fund raising was available as FLFC does promise it will fund our outreach. They do have a budget line for local food so we were able to deliver procurement items weekly in 2017, but at that time, we did not have a website or easy way for them to order besides email. Because we were not crop planning but instead offering whatever was available, every week the items changed, and this made it difficult for the cafeteria teams to plan their regular orders around unknown availability.

25 cucumbers, 12 bell peppers, 5 watermelon, and 12 packs of cherry tomatoes doesn't seem like a lot to a farmers market producer and our farmers thought they could easily add it in to normal sales. However, we soon learned the ability to do that week after week consistently requires a network of farms working collaboratively. Imagine those numbers in 23 buildings and now you understand the economic opportunity approaching next year.

These were all very valuable lessons that we have been able to use to prepare us for the successes of the procurement rollout in the next school year. At that point, foodservice directors will be able to access a single sign on site that provides access to available foods from the three food hubs, FLFC, FGA, and HHM and the aggregation process will be automated from there.

Without the work of this cafeteria and willingness of the team to try anything during this pilot, we would likely not be rolling out region-wide next year. A huge thank you to the team at Rising Sun-Ohio County Schools!

**Batesville Community School Corporation**, Foodservice Director: Berna Meyer.  
Number of students: 2081



**Success Story:** This story came to us via our community partners with Margaret Mary Health (MMH) <https://www.mmhealth.org/> when one of the dietitians had this experience. During the intake interview, the young patient reported she had recently read many stories about how dangerous different kinds of food were and so she had decided to stop eating anything that she thought would later cause her cancer, and reported she was only willing to eat six foods. Although they were all healthy choices, they did not provide a well-rounded nutritional impact prompting the mother to seek help from MMH.

The dietitian began to list foods that would be considered healthy choices and talked with the young girl about her concerns around the safety of eating these foods. It was quickly identified that she was talking more about the way the foods were prepared such as fried versus grilled and the dietitian was able to share some nutritional information with the girl. When the dietitian asked about kale and arugula the young patient exclaimed that she LOVED both of those items. Recognizing that was an odd response from a young picky eater and hearing the mother's surprise because they were not foods normally eaten at home, the dietitian asked how she knew about kale and arugula. The patient remarked that she had tasted both of those items in school from a tower garden, a tower garden that was installed at the Batesville School system in October 2020 with funds from this grant. While this isn't directly a procurement success, it does speak to the far-reaching impact Farm2School outreach can have with a community approach.

**Jac-Cen-Del School Corporation**, Foodservice Director: Jane Ann VanKirk.  
Number of students: 893

**Success Story:** Because they are one of five k-12 schools in their county and their ultra-remote location, this district rarely sees visitors like Extension officers or Farm Bureau Ag in the Classroom folks. Harvest of the Month was a great program for them and they are excited to participate in all of our programs. Jane Ann has volunteered to participate in a recipe building project we'll complete next year as we brainstorm where to hide zucchini in chili or soup and some other fun season extension options.



**Lawrenceburg Community Schools,** Food Service Director: Sarah Erb.  
Number of students: 2050

**Success story:** When I first reached out to this school, the foodservice director was not interested in participating. However, when Sarah Erb joined the team, she made sure we rolled out Harvest of the Month in all the buildings. The cafeteria leaders were very excited about the programming and the kids learned to anticipate the 3rd Wednesday of the month.



**Milan Community Schools,** Food Service Director:  
Number of students: 1124

**Success Story:** Our grant allowed us to reimburse foodservice workers for their time spent during training for their CE credits. We were able to connect them to the Institute of Child Nutrition to complete that training and this team really got serious about it. Eight workers completed over 80 hours of training to prepare them for the work we will do with more fresh foods next year.

**Oldenburg Academy,** Food Service Director: Angie Voegle.  
Number of students: 250

**Success Story:** Oldenburg was supported by Michaela Farm which was created by the Sisters of their parochial school. Because of this they have funds built into the budget for local food that are currently not being used. They are a private school and not bound by the legalities of procurement and so for all these reasons will be the pilot school for the 2021-22 SY. This should provide great insight for the programming as we prepare to write the final bids.

**South Dearborn Community Schools,** Food Service Director: Jessica Peak.  
Number of students: 2550

**Success Story:** When I first met with this school, they were in transition for a new Superintendent and so I met with the FSD, who then also left the district. During those two school years, it was difficult to connect with this location. When Jessica was appointed, she was very excited to work with the Harvest of the Month and introduced us in all the cafeterias. They have one building that struggles with equipment concerns, but otherwise they are looking forward to procurement efforts.

**South Ripley Community Schools**, Food Service Director: Carol Holcomb.  
Number of students: 1303

**Success Story:** This school district also suffers from a lack of agriculture education resources from a rural location. They offered HVM in all the buildings to great success and are looking forward to procurement efforts next year. We heard a lot of conversations about “fresh taste” and “trying new tastes” from this group. The cafeteria staff was very receptive to work with the local products and were always eagerly anticipating our deliveries. This kind of excitement spilled over to the service line because this group really had great success month after month offering the local items.



**St. Louis Catholic Schools**, Food Service Director: Tammi Wintz.  
Number of students: 356

**Success Story:** St. Louis was one of the first schools to join our network during our expansion phase. The team in the cafeteria at St. Louis has been so excited to work with local food and even though staffing and leadership changes, they have continued to offer local foods when it’s available. They participated in all seven Harvest of the Month activities and look forward to working with procurement items next school year.

**Sunman-Dearborn Community Schools**, Food Service Director: Cheryl Earhart.  
Number of students: 3868

**Success Story:** This school district has a very active FFA and FCCLA presence and the administration was hesitant to participate thinking they had a full Farm2School program. After Cheryl connected with the program and realized how the Harvest of the Month program allowed her to share nutrition education with the students, she became a champion for the program at her school. Currently, we are only serving in the middle school in a trial phase but expect to roll to all their buildings with the procurement efforts.

## Biggest take a way:

- Don't be surprised how long it takes to make procurement happen
- Be sure to find a champion, or better a group of champions, to keep moving forward.
- There is no way any one of our organizations could have taken this across the finish line working independently and competitively. Because we sought a collaborative agenda, we were able to accomplish more than the original stated goals.
- Anyone that wants to foster Farm2School activities in their area has access to literally thousands of online resources, toolkits, webinars, newsletters, and trainings from federal, state, and county organizations. There is no need to reinvent the wheel or spend resources creating programs; Just implement.





# Appendix



# Appendix A: Important Explanations and Definitions

## 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, where they later distribute.

## Average Daily Participation

The Average Daily Participation for the National school Lunch and School Breakfast Program is based on attendance rather than enrollment. Calculating ADP in this manner is considered to be fairer to school as it does not include children who do not eat lunch/breakfast in the calculation

## 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.

## Child Nutrition Programs (CNPs)

Federally funded programs administered through the United State Department of Agriculture Food and Nutrition Service (USDA FNS) that helps 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 for a Child Nutrition Program. These positions are at the district level and are often referred to as Food Service Directors.

## 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.



## Competitive Proposals

A technical proposal that explains how the prospective vendor will meet the objectives of the solicitation and a cost element that identifies the costs to accomplish the technical proposal. While price alone is not the sole basis for award, price remains the primary consideration when awarding a contract under the competitive proposal method.

## Conflict of Interest

A conflict of interest is any action that allows a person to benefit at the expense of the public interest or the expense of his or her employer

## Contract

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

## Contract Administration System

Refers to the policies and procedures the school food authority has in place to ensure that vendors perform in accordance with the terms, conditions and specification of its contracts or purchase orders

## Cooperative Purchasing

Occurs when a group of schools join together to accomplish all or part of the steps in the purchasing task. Cooperative purchasing allows schools to leverage buying power and. Potentially, to reduced costs and increase the quality of products and services available to members

## 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.

## 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
- **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 intermediary, e.g. between a 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 or 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.

### **Formal bid (Competitive Sealed Bidding)**

(Over \$150,000) – Invitation for Bid (IFB) or Request for Proposal (RFP). The difference between the IFB vs the RFP is the IFB is predominantly awarded only on price. The RFP may have other scoring criteria, such as delivery, quality, location, etc. With both IFB and RFP, clear specifications and evaluation criteria should be developed, and they should not be unduly restrictive.

Publicizing the solicitation appropriately to the widest possible audience, and allowing adequate time for the respondent to prepare a responsive bid or proposal. The state requires, at minimum, two publications, at least one week apart, with the second publication at least 7 days before the bid opening.

## Geographic preference

Generally speaking, any price preference impacts free and open competition. However, geographic preference may have a greater or lesser impact on free and open competition depending on the characteristics of the market. The application of the geographic preference option must leave an appropriate number of qualified firms, given the nature and size of the procurement, to compete for the contract, as it is imperative that the SFA does not unnecessarily restrict free and open competition. For example, indicating a preference for products grown within 5 miles when only one farm meets that definition, would be considered an unreasonable limit on competition. However, if 100 farms meet that definition, the preference would not result in an unreasonable limit on competition.

## Good Agricultural Practices (GAP)

A voluntary audit that verifies that fruits and vegetables are produced, packed, handled, and stored as safely as possible to minimize risks or microbial food safety hazards.

- GAP Audit:  
<https://www.ams.usda.gov/sites/default/files/media/GAPProgramScope.pdf>
- GAP for small fresh produce farmers and vendors:  
[https://nifa.usda.gov/sites/default/files/resource/GAPS%20for%20Small%20Farmers%20WKU%202015%20508\\_1.pdf](https://nifa.usda.gov/sites/default/files/resource/GAPS%20for%20Small%20Farmers%20WKU%202015%20508_1.pdf)
- Purdue/Illinois GAP for fruit and vegetable farms:  
<https://www.extension.purdue.edu/extmedia/gp/gp-1-w.pdf>
- PSA Trainings:  
<https://ag.purdue.edu/extension/safeproduce/Pages/default.aspx>

## Grade Standards

USDA quality standards and are based on measurable attributes that describe the value and utility of the products. U.S. Grade Standards provide a uniform language for describing the quality and condition for meat, poultry, fresh fruits and vegetables, and processed fruits and vegetables. While safety inspections are mandatory, the Federal government does not require that all food products are graded.

### **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.

### **Local foods**

Local food is defined as the direct or intermediated marketing of food to consumers that is produced and distributed in a limited geographic area. There is no predetermined distance to define what consumers consider “local,” but a set number of miles from a center point or state/local boundaries is often used. More importantly, local food systems connect farms and consumers at the point of sale. (Sources: <https://www.nal.usda.gov/aglaw/local-foods> and <https://www.usda.gov/media/blog/2010/07/16/what-local-food>).

### **Market Channel**

The path goods take from the producer to the end-consumer

### **Micro purchase**

(Under \*\$10,000) – Rotate vendors. You must maintain a list of vendors from which you will rotate within the same year. One purchase of each specific food item (e.g. corn, tomatoes) per producer per year, until all other vendors on the list have been purchased from. This is a good way to procure food to try new menu items or host a local food “event.”

### **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 purchasing of goods and services. It promotes free and open competition which is essential to ensure the best cost and quality of goods and services. Proper procurement avoids conflict of interest

### **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 food service in a district

### **Small Purchase (Informal Procurement)**

(Between \*\$10,000 - \$150,000 ) – Obtain 3 quotes. Once you obtain the three quotes, you will choose the highest scoring quote. Price should be the highest determining factor. You can use other factors such as delivery, location, quality, etc.

### **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 the Child Nutrition Program. State agency that administers the Child Nutrition Program in Indiana is the Indiana Department of Education.



### **Transparent**

Means that everything is done by the school food authority must be clear, forthright, and open

### **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).

### **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

*The above definitions have been collected from foodservice directors, Bringing the Farm to School Training, and the USDA's Procuring for Child Nutrition Programs.*

# Appendix B: Small Purchase Quote

## Small Purchase Quote

Completed by: [Redacted]		Date completed: [Redacted]	
Vendor 1:		Vendor 2:	
Name:	[Redacted]	[Redacted]	Vendor 3:
Address:	[Redacted]	[Redacted]	[Redacted]
Contact:	[Redacted]	[Redacted]	[Redacted]
Phone:	[Redacted]	[Redacted]	[Redacted]
Fax:	[Redacted]	[Redacted]	[Redacted]
Terms:	[Redacted]	[Redacted]	[Redacted]
Delivery:	[Redacted]	[Redacted]	[Redacted]
Specifications: [Redacted]			

Item	Description	Quantity	Vendor 1		Vendor 2		Vendor 3	
			Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

# Appendix C: Phone Quote Example

## PURCHASE PHONE QUOTE

Use this form to document requests for price quotes. Request that all quotes be FOB Destination. Attach completed form to Purchase Order.

PREPARED BY: \_\_\_\_\_ DATE PREPARED: \_\_\_\_\_  
 SECTION/UNIT: \_\_\_\_\_ DATE QUOTES DUE: \_\_\_\_\_  
 PHONE NO: \_\_\_\_\_ TIME QUOTES DUE: \_\_\_\_\_

### VENDOR 1

### VENDOR 2

### VENDOR 3

Name _____	Name _____	Name _____
Address _____	Address _____	Address _____
Phone _____	Phone _____	Phone _____
Fax _____	FAX _____	FAX _____
Contact _____	Contact _____	Contact _____
FOB _____	FOB _____	FOB _____
Terms _____	Terms _____	Terms _____
Delivery _____	Delivery _____	Delivery _____

Comments/Specifications: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

ITEM	DESCRIPTION	QUANTITY	VENDOR 1		VENDOR 2		VENDOR 3	
			UNIT PRICE	TOTAL PRICE	UNIT PRICE	TOTAL PRICE	UNIT PRICE	TOTAL PRICE
<b>TOTALS</b>								

# Appendix D: Manchester Community Schools RFP Example

Insert date

Insert name of school/district Food Service is seeking quotes from local beef producers to supply the products specified below to serve in its cafeterias in the insert year school year.

Local is defined as producers who operate within or close by our community.

The beef products must be processed in an Indiana State inspected facility.

Preference will be given to producers who operate family farms rather than large beef production operations.

Preference will be given to those beef producers who are able to deliver the products to insert delivery location.

We would be willing to take delivery of the item specified below starting on or after insert date.

The bid will be awarded to a beef producer who has a good reputation, is responsible and is able to meet our needs. We reserve the right to award the bid to multiple producers if one producer is unable to supply the quantity needed.

Please respond by contacting inset contact name, contact email, phone number and mailing address by insert date.

Sample bid specifications listed below

Item description: 840 pounds of 100% ground beef patties, no fillers, patties ¼ pound each, delivered frozen, packed in quantities 4 - 25 patties per package.

Item description: 100 pounds - 100% beef stew meat, cut in approximately 1" boneless pieces, delivered frozen, may be packaged in 1 pound to 5-pound packages at the processor's discretion.

Sincerely,





# Appendix F: Bartholomew Consolidated School Corporation RFP

INSERT DATE

INSERT SCHOOL NAME Food Service Department is seeking price quotes for locally grown produce and food items for School year 2021-2022. Please complete the quote sheet and checklist for retail purchasing form. When filling out the quote sheet please include variety of item for example for apples, please list some varieties you would offer to us...gala, goldrush, etc.

INSERT ANY OTHER THINGS OF NOTE OR REQUIREMENTS. Please note that we cannot purchase from you unless you are registered with the state food protection program. I have enclosed registration form and information on the Farm Produce Safety Registration Initiative. You may contact Joanna Beck for questions regarding registration 317-476-0056. You must also have taken GAP (good agriculture practices) training.

Please let me know if you have any questions regarding this program.

INSERT NAME  
INSERT TITLE  
ADDRESS  
PHONE

Please submit quotes & Retail purchasing checklist by **INSERT DATE**

Sincerely,

INSERT NAME  
INSERT TITLE

# Appendix G: Bartholomew Consolidated School Corporation Farm to School Quotes

## FARM TO SCHOOL QUOTES BCSC SY 21-22

Name of Producer/Farm: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Farm Contact person: \_\_\_\_\_ Phone number \_\_\_\_\_  
 Email \_\_\_\_\_

Do you carry farm liability insurance for product purchases? \_\_\_\_\_

Are you able to deliver produce to BCSC main warehouse? \_\_\_\_\_

Are you able to accept P.O's \_\_\_\_\_

If there are products not listed below that you would like considered for use in the school meals program, please add them to this form in the space provided below.

PRODUCT	VARIETY OFFERED	COST	STATE PACK/COUNT	MONTHS AVAILABLE
APPLES				
BELL PEPPERS				
TOMATOES				
CANTALOUPE				
CUCUMBER				
STRAWBERRIES				
WATERMELON				
RADISHES				
SPINACH				
BLACKBERRIES				
RASPBERRIES				
BLUEBERRIES				
CHERRY TOMATOES				
SNACKING PEPPERS				

# Appendix H: Bartholomew Consolidated School Corporation Checklist for Retail Purchasing of Local Produce

## CHECKLIST FOR RETAIL PURCHASING OF LOCAL PRODUCE

PRODUCTION PRACTICES	YES	NO	N/A
Are wells protected from contamination?			
If irrigation is used, what source? ___well ___stream ___Pond___municipal___other			
What types of manures are used? ___raw manure ___composted ___aged ___no manure used			
Is raw manure incorporated at least 2 weeks prior to planting and or 120 days prior to harvest?			
Is the field exposed to runoff from animal confinement or grazing areas?			
Is land that is frequently flooded used to grow food crops?			
Are coliform tests conducted on soil in frequently flooded land?			
Are farm livestock and wild animals restricted from growing areas?			
Are portable toilets used in a way that prevents field contamination from waste water?			
PRODUCT HANDLING	YES	NO	N/A
Are storage and packaging facilities located away from growing areas?			
Is there risk of contamination with manure?			
Are harvesting baskets, totes, or other containers kept clean and sanitized?			
Is harvesting equipment/machinery kept as clean as possible?			
Are products and non product containers available and clearly marked?			
Is dirt, mud or other debris removed from product before packing?			
Are food grade packaging materials clean and stored in areas protected from pets, animals?			
TRANSPORTATION	YES	NO	N/A
Is product loaded and stored to minimize physical damage and risk of contamination?			
Is transport vehicle well maintained and clean?			
Are there designated areas in transport vehicle for food products and non food products?			
Are products kept cool during transit?			
WORKER HEALTH AND HYGIENE	YES	NO	N/A
Is a worker food safety training program in place?			
Are workers trained about hygiene practices and sanitation with signs posted?			
Are workers and visitors following good hygiene and sanitation practices?			
Are smoking and eating confined to designated areas separate from product handling?			
Are workers instructed not to work if they exhibit signs of infection(fever, diarrhea, etc)?			
Do workers practice good hygiene by:			
Wearing clean clothing and shoes			
Changing aprons and gloves as needed			
Keeping hair covered and restrained			
Washing hands as required			
Limiting bare hand contact with fresh products			
Covering open wounds with clean bandages			
Do workers have access to toilets and hand washing stations with proper supplies?			

I confirm that the information provided above is accurate to the best of my knowledge.

Signature of Seller: \_\_\_\_\_ Date: \_\_\_\_\_



# Appendix I: Writing Clear, Through Specifications

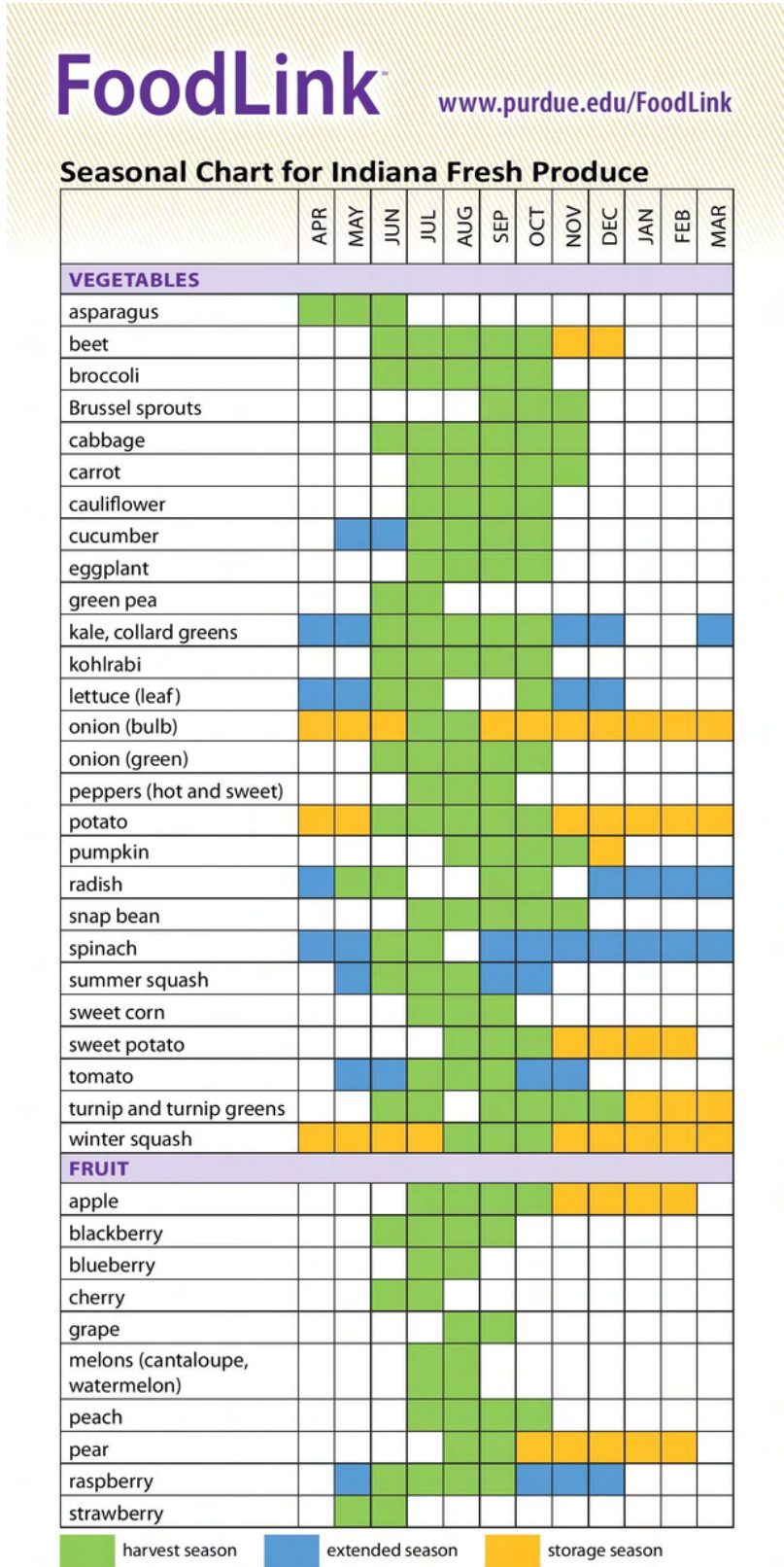
Characteristic	Description	Your Specification
Product Name and Variety	SFAs can be as specific as they want in terms of product and variety. If an SFA is procuring apples, they might specify a range of varieties or just one variety.	
Grade	Depending on the intended use for a product, it might be important to specify a U.S. Grade Standard. However, local producers may or may not be familiar with U.S. Grade Standards. The SFA should review the grade standard for desired quality and condition of the product that best fits its needs. Upon selecting the grade, include in the specification descriptive words such as “well-formed” or “well-colored” that explain the attributes desired. This will prevent the district from paying for higher quality product than necessary.	
Size	SFAs should include the approximate size of the product where applicable. Size may be expressed by count or number per standard case size, ounces per unit, diameter, etc. Size is also important relative to meal contribution, consistency, yield and labor cost.  Note: If you are processing in house with manual or mechanical equipment, make sure the size of the product does not affect outcome.	
Quantity	Quantity should be included in a specification to inform seller how much product the SFA intends to purchase. Generally, the higher the quantity the better the price. Farmers and SFAs sometimes speak different languages. School districts order in cases or pounds, but farmers sell in bushels and pecks. SFAs should refer to conversion charts to help identify quantity needed. Further, stating a product in just pounds may lead to a larger quantity of smaller product, thus increasing labor.	

# Appendix I: Writing Clear, Through Specifications

Characteristic	Description	Your Specification
Quality	Quality descriptors are included in U.S. Grade Standards. Again, the SFA should review desired attributes of quality and condition to include in specification. Also, specifying number of hours or days from harvest or ripeness of the product may improve the quality of the item received.	
Cleanliness	SFAs should indicate their expectations regarding the product's cleanliness. Consider stating product should be clean with no visible signs of dirt or pests.	
Packaging	SFAs should designate size and/or weight of packaged product. Large, heavy containers may be unsafe and unmanageable by employees. Inner packaging may not be necessary if the outer package is sufficient. The district should determine if new packaging is required, otherwise farmers may repack product in used containers. Some SFAs receive local products in reusable containers, also known as reusable plastic containers (RPCs). Be sure RPCs are cleaned and sanitized between uses.	
Food Safety	SFAs should always purchase food from reliable, reputable sources that follow GAPs and good handling practices (GHPs). USDA does not require school nutrition programs to purchase from GAP certified farms. In some instances, school districts or States may require schools purchase only from GAP certified farms. Food safety requirements should be clearly outlined in the bid proposal. Ultimately, it is up to the buyer to determine and document purchases are coming from a safe source.	
Farm Practices and Characteristics	SFAs are free to specify farm characteristics and practices, as long as they do not overly limit competition.	
Delivery	SFAs should establish delivery criteria. Allow flexibility in harvesting and delivery due to weather, where applicable. Product harvested in wet fields could lead to problems with product cleanliness.	



# Appendix J: Indiana Seasonality Chart



# Appendix K: Pecks to Pounds

## Translation Chart “Pecks to Pounds”

Commodity	Unit	Approximate Net Weight		
		U.S. Pounds	Metric Kilograms	
Apples	bushel	48	21.8	
	loose pack	38-42	17.2-19.1	
	tray pack	40-45	18.1-19.1	
	cell pack	37-41	16.8-18.6	
Asparagus	crate	30	13.6	
Beans	bushel	56-60	25.4-27.2	
Blackberries	12, 1/2-pint basket	6	2.7	
Broccoli	wirebound crate	20-25	9.1-11.3	
Brussel sprouts	ctn, loose pack	25	11.3	
Butter	block	55,68	25,30.9	
Cabbage	open mesh bag	50	22.7	
	flat crate (1 3/4 bu)	50-60	22.7-27.2	
	ctn, place pack	53	24	
Cantaloupes	crate	40	18.1	
Carrots	film plastic bags, mesh sacks, and cartons holding 48 1lb. film bags	55	24.9	
	Cauliflower	WGA crate	50-60	22.7-27.2
Celery	crate	60	27.2	
Cherries	lug	20	9.1	
Corn	wirebound crate	50	22.7	
	ctn, packed 5oz ears	50	22.7	
Cucumbers	bushel	48	21.8	
Eggplant	bushel	33	15	
Eggs	average size, case, 30 doz.	47	21.3	
Garlic	ctn of 12 cubes or 12 film bag pkgs, 12 cloves each	10	4.5	
	Grapes	Eastern, 12-qt basket	20	9.1
	Western, lug	28	12.7	
Honey	gallon	11.84	5.4	
	Honeydew melons	2/3 ctn	28-32	12.7-14.5
Kale	ctn or crate	25	11.3	
Lettuce	carton packed, 24	43-52	19.5-23.6	
Lettuce, greenhouse	24-qt basket	10	4.5	
Milk	gallon	8.6	3.9	
Onions	dry, sack	50	22.7	
	green, bunched, ctn 12-doz.	10-16	4.5-7.3	

Courtesy of the Maryland Department of Agriculture

# Appendix K: Pecks to Pounds

## Translation Chart, Cont. “Pecks to Pounds”

Commodity	Unit	Approximate Net Weight	
		U.S. Pounds	Metric Kilograms
Peaches	bushel	48	21.8
	2 layer ctn or lug	22	10
	3/4-bu, ctn crate	38	17.2
Pears	bushel	50	22.7
Peas	unshelled, bushel	28-30	12.7-13.6
Peppers	bushel	25-30	11.3-13.6
Plums	ctn or lug	28	12.7
	1/2-bu basket	30	13.6
	bushel	60	27.2
Potatoes	barrel	165	74.8
	box	50	22.7
	1/2-pt baskets	6	2.7
Raspberries	1/2-pt baskets	6	2.7
Spinach	bushel	18-20	8.2-9.1
Strawberries	24-qt crate	36	16.3
	12-qt crate		
Sweet potatoes	bushel	55	24.9
	crate	50	22.7
Tomatoes	crate	60	22.7
	lug box	32	14.5
	2-layer flat	21	9.5
Tomatoes, greenhouse	12-qt basket	20	9.1
Turnips	without tops, mesh sack	50	22.7
	bunched, crate	70-80	31.8-36.3
Watermelons	melons of average or medium size	25	11.3

# Appendix L: USDA Foods: A resource for Buying Local



United States Department of Agriculture



## USDA FOODS: A Resource for Buying Local



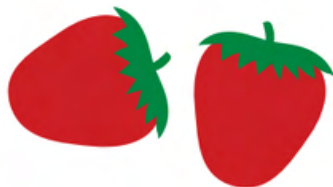
USDA FOODS has a dual mission of supporting domestic agriculture and providing healthy foods to schools. Offerings include a wide variety of high quality fruits, vegetables, dairy products, whole grains, lean meats, and other protein options. USDA Foods support the Dietary Guidelines for Americans and the school meal pattern requirements to make it easier for schools to prepare healthy meals.

Schools receive two types of support from USDA. The majority of the support is provided in the form of cash reimbursement for the meals served, and the second form of support is the ability to order foods that USDA purchases ("USDA Foods") which can make up about 15-20% of the value of the food served in the National School Lunch Program.

USDA Foods supports local purchasing in several ways:

### Maximize Funds for Local Purchases

In a time of tightening budgets, every dollar of USDA Foods delivered to a school frees up money that a school would otherwise have to spend commercially. By using USDA Foods products, schools can save cash reimbursement dollars for local purchases.



**"Menuing USDA Foods = More \$ for Local Foods:**  
USDA Foods are purchased by the federal government in bulk and offered to schools at a lower cost than commercially available foods. Smart menu planning to fully utilize USDA Foods allows Vermont School Meals programs a little extra room in their budget to purchase things like local beef, eggs and produce."

*- Vermont Agency of Education*

"USDA is a partner in meeting my local purchasing goals. I often shift my entitlement to products that are not available locally and to products, like the roast chicken, that USDA Foods is able to offer at a lower price point than I could get as an individual school district."

*- Andrea Early, Director of School Nutrition,  
Harrisonburg City Public School*

### Champion American Agriculture

USDA Foods are all produced in the United States; thus it is possible to order foods through the USDA Foods catalog that are produced in your region. For example, Mississippi is the only state that produces significant, commercial quantities of catfish. If a school is located in the Southeast, USDA Foods catfish could be local to that school. Likewise, pears usually originate from the Pacific Northwest and could be local to schools in this area.

OFFICE of  
COMMUNITY  
FOOD SYSTEMS



# Appendix L: USDA Foods: A resource for Buying Local



United States Department of Agriculture

## Support Local Processors

Many States allocate a portion of their USDA Foods entitlement to processors who further process bulk USDA Foods into desired end products such as burritos, burgers, rice bowls, or sliced apples. Check with your State to see if there are approved local processors in your area.

## Promote Local Fruit and Vegetable Producers

The USDA DoD Fresh Program is another choice in a request-driven system to help States manage and utilize USDA Foods entitlement more effectively. This program offers many different types and varieties of produce grown in the United States, including a variety of package sizes, whole and pre-cut options, and locally grown produce when in season.



### Learn More

Refer to the [Food Distribution page](#) of the FNS website for a complete list of the foods available and information sheets for each product.

To identify USDA Foods that may be local to you, check out the [state of origin reports](#). For more information on USDA Foods processing, visit the [USDA Foods Processing webpage](#):

For more information about the USDA DoD Fresh Program, please refer to the [USDA DoD Fresh Program webpage](#).



For more information, and to sign up for the bi-weekly e-letter from the Food and Nutrition Service's Office of Community Food Systems, please visit [www.fns.usda.gov/farmtoschool](http://www.fns.usda.gov/farmtoschool). Questions? Email us at [farmtoschool@fns.usda.gov](mailto:farmtoschool@fns.usda.gov).

USDA is an equal opportunity provider and employer. Updated August 2017.

OFFICE of  
COMMUNITY  
FOOD SYSTEMS



# Appendix M: Using DoD Fresh to Purchase Local Produce



United States Department of Agriculture



## USING USDA DOD FRESH TO PURCHASE LOCAL PRODUCE



THE USDA DEPARTMENT OF DEFENSE Fresh Fruit and Vegetable Program (USDA DoD Fresh) is available to schools in 48 States, the District of Columbia, Guam, Puerto Rico, and the Virgin Islands. More than 22,000 schools receive fresh fruits and vegetables from this program. Schools interested in participating in the USDA DoD Fresh program should reach out to the State Distributing Agency.

### How Does It Work?

USDA DoD Fresh is a partnership between USDA and the Department of Defense (DoD) Defense Logistics Agency (DLA). This program leverages DoD's procurement system to provide a variety of nutritious U.S.-grown fresh fruits and vegetables to schools. Schools receive two types of support from the USDA. The majority of the support is provided in the form of cash reimbursement for the meals served, and the second form of support is the ability to order foods that USDA purchases ("USDA Foods") which can make up about 15-20% of the value of the food served in the National School Lunch Program. USDA DoD Fresh is one option that schools can use to spend their entitlement.

### What are the Advantages of DoD Fresh?

- \* **Flexibility:** USDA DoD Fresh is another choice in a request-driven system to help States and school districts manage and utilize USDA Foods entitlement more effectively.
- \* **Consistency:** USDA DoD Fresh vendors update the catalog weekly and schools can receive deliveries as frequently as every week, making orders timely, fresh, and responsive to market fluctuations.

- \* **High quality:** DoD maintains high quality standards through Produce Quality Audits, requires vendors to follow Good Agricultural Practices (GAP) and Good Handling Practices (GHP), and requires that pre-cut produce is sourced from approved suppliers.
- \* **Variety:** USDA DoD Fresh offers many different types and varieties of produce, all grown in the United States. School districts can choose between different package sizes, whole or pre-cut options, and can select locally grown produce when in season.
- \* **Easy ordering and funds tracking:** Schools place orders via the web-based Fresh Fruit and Vegetable Order/Receipt System (FFAVORS). The prices listed in the FFAVORS catalog reflect the prices that schools will be billed for the product. FFAVORS tracks schools' entitlement fund balances and total order costs. DoD manages vendor payment and reconciliation.

OFFICE of  
COMMUNITY  
FOOD SYSTEMS

# Appendix M: Using DoD Fresh to Purchase Local Produce



United States Department of Agriculture

CASE QUANTITY	ITEM CODE	DESCRIPTION	STATE OF ORIGIN	CASE CONTENTS	CASE PRICE
	14M10	APPLES R/D 125-138 CT 40 LBS CS	MI, PA, WA	40 LB	\$25.98
	14M33	CARROTS WHL 5 LB BG	*Local Grown GA	5 LB	\$5.20
	15A85	PEPPERS SWT CHL GRN DICE 5 LB BG	*Local Grown FL	35 LB	\$13.58
	15M94	ORANGES CHIL 50/4.7 OZ CO	CA	15 LB	\$30.45
	15Q29	KALE GREEN 1/20 LB CS	*Local Grown GA, SC	20 LB	\$17.95
	18B17	TOMATOES FRESH 5X6 5 LB CS	*Local Grown FL	5 LB	\$7.56
	18A54	BLUEBERRIES FRESH 12/6 OZ EA 4.5 LB CS	*Local Grown CA, NC	5 LB	\$19.40

The FFAVORS catalog indicates which foods are grown locally.

## Local Produce through USDA DoD Fresh

All produce is required to be grown in the United States. Vendors provide the state of origin for each product. Local produce is defined as produce from within the state or adjacent states. Vendors are encouraged to provide local products in season. Local produce must meet contract requirements for quality and food safety and be priced competitively.

## What Should States and School Districts Do if They Want to Source Local Foods Through USDA DoD Fresh?

States and schools that want to purchase local foods through USDA DoD Fresh should start by looking for products already marked with the state or origin in the FFAVORS catalog. States and schools can also contact their USDA DoD Fresh produce vendor to find out which local products the vendor expects to carry throughout the year, or to make their interest in local produce known to the USDA DoD Fresh vendor.

## How is the Program Funded?

States work with schools to manage how much USDA Foods entitlement to allocate to USDA DoD Fresh and to ensure entitlement is fully utilized.

## Learn More

The **Defense Logistics Agency website** provides background information about DoD and links to each vendor's contract.

The **Food and Nutrition Service website** provides contact information for farm to school personnel in your area, and a helpful history of the DoD Fresh program.

\*\*\*\*\*  
 For more information, and to sign up for the bi-weekly e-letter from the Food and Nutrition Service's Office of Community Food Systems, please visit [www.fns.usda.gov/farmtoschool](http://www.fns.usda.gov/farmtoschool).  
 Questions? Email us at [farmtoschool@fns.usda.gov](mailto:farmtoschool@fns.usda.gov).

USDA is an equal opportunity provider and employer. Updated August 2017.

OFFICE of  
**COMMUNITY**  
**FOOD SYSTEMS**

# Appendix N: Geographic Preference: What It Is and How to Use It



United States Department of Agriculture

## GEOGRAPHIC PREFERENCE What It Is and How to Use It



**THE 2008 FARM BILL** directed the Secretary of Agriculture to encourage schools to purchase locally grown and locally raised products “to the maximum extent practicable and appropriate.” The Secretary was also instructed to allow child nutrition program operators to use a “geographic preference” when procuring locally grown and locally raised unprocessed agricultural products.

There are many ways for schools to buy local products for use in federal child nutrition programs (see **USDA’s 10 Facts About Local Food in School Cafeterias**). While using geographic preference is not the only option for buying local foods, it is a powerful tool and particularly useful in formal solicitations where respondents are ranked and scored.

### Types of Products

The ability to apply a preference for local products applies only to unprocessed or minimally processed items. The geographic preference rule does not apply to any products that have been cooked, heated, canned or that have any additives or fillers. It can be applied to a wide array of products that meet the definition of unprocessed or minimally processed such as various forms of fruits, vegetables, meats, fish, poultry, dairy, eggs, and grains.

### Defining Local

Definitions for local vary widely depending on the unique geography and climate where a school is located and on the abundance of local food producers and manufacturers. Many schools define local as within a certain number of miles from the school, within the county, or within the state. Alternatively, definitions might include more than one state (i.e., Georgia, Alabama, and Florida) or discrete parts of several states (i.e., specific counties in southwest Washington, northeast Oregon, and Idaho). In addition, many programs use different definitions of local depending on the product or season. Also, please note that when applying geographic preference, origin is tied to the agricultural product, not the location of the respondent.

### Who Defines Local?

Schools define what they mean by local. While many state and/or local governments have adopted definitions of local such as “within the state” or “within the county,” schools using a geographic preference when sourcing food for the federal child nutrition programs are under no obligation to adopt any definition for local that might be in existence in local areas.

OFFICE of  
COMMUNITY  
FOOD SYSTEMS



# Appendix N: Geographic Preference: What It Is and How to Use It



United States Department of Agriculture

## Three Examples for Using Geographic Preference

Federal regulations do not prescribe the precise way that geographic preference should be applied, or how much preference can be given to local products. Thus, there are a variety of ways to apply geographic preference and one way is not considered better or more effective than another. The key is to be sure that use of geographic preference does not restrict full and open competition. Further, regardless of which method is used, the selection criteria must be clearly described in all solicitation materials.

### EXAMPLE ONE

A school district issues an invitation for bid (IFB) for apples and states a preference for apples grown within 100 miles of the school. IFBs are generally used when a firm fixed-price contract will be awarded to the lowest responsive and responsible bidder. The solicitation makes it clear that any respondent able to provide local apples will be awarded 10 points in the selection process. In this example, the 10 preference points are equivalent to a 10 cent reduction in price for the purposes of evaluating the lowest bidder.

	OWEN'S ORCHARD	APPLE LANE FARMS	ZOE'S BEST
Price	\$1.97	\$2.05	\$2.03
Apples within 100 miles of school	No	Yes (10 Points)	No
Price with preference points applied, for evaluation purposes only	\$1.97	\$1.95	\$2.03

*Apple Lane Farms meets the stated preference for local products and is awarded 10 additional points, which translates into deducting 10 cents from Apple Lane Farm's price. This makes Apple Lane Farms the "lowest bidder." The school still pays Apple Lane Farms \$2.05 for its product; deducting 10 cents from the price of responsive bidders that meet the geographic preference only applies to determining the winning respondent and would not affect the actual price paid to the respondent.*

\* \* \* \* \*

### EXAMPLE TWO

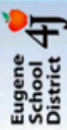
A school district issues a request for proposals (RFP) for its produce contract and indicates a preference for fresh fruits and vegetables produced within the state. For the purposes of evaluating bids, respondents who can supply at least 60% of the requested items from within the state will receive a 10% price reduction.

	PRODUCE EXPRESS	RAY'S PRODUCE	F&V DISTRIBUTION
Contract Price	\$31,000	\$35,000	\$34,000
% F&V from within the state	20	80	50
Geographic preference points to respondent able to meet > 60% local items	No	Yes (10% pref.)	No
Price with preference points applied, for evaluation purposes only	\$31,000	\$31,500	\$34,000

*Ray's Produce is the only firm that is able to supply greater than 60% of the requested items from the state, thus, Ray's Produce receives a 10% reduction in price for the purposes of evaluating bids. Even with the reduction, Ray's Produce is not the lowest bidder. If price alone were the determining factor for this school district, Produce Express would be awarded the contract.*



# Appendix O: Sample Menu



Eugene School District is an equal opportunity provider

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<p><b>4</b></p> <p><b>BREAKFAST:</b> Whole Grain Pancakes</p> <p><b>LUNCH:</b> Hand Rolled Bean &amp; Cheese Burrito Chicken Nuggets with a whole wheat roll Wiener Wrap Tuna Sandwich on whole wheat bread</p>	<p><b>5</b></p> <p><b>BREAKFAST:</b> Whole Grain Waffles</p> <p><b>LUNCH:</b> Pepperoni Pizza Homemade Vegetables Chili served with brown rice Ham &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>6</b></p> <p><b>BREAKFAST:</b> Egg &amp; Cheese on an English Muffin</p> <p><b>LUNCH:</b> Bean &amp; Cheese Enchiladas French Toast Sticks served with turkey sausage Caesar Salad Turkey and Cheese Sandwich on whole wheat bread</p>	<p><b>7</b></p> <p><b>BREAKFAST:</b> Whole Grain French Toast Sticks</p> <p><b>LUNCH:</b> Cheese Pizza BBQ Chicken Pizza Spaghetti with Marinara Sauce Turkey &amp; Cheese Sandwich Casablanca Hummus served with a whole grain bagel and full cup</p>	<p><b>1</b></p> <p>No School</p>
<p><b>11</b></p> <p><b>BREAKFAST:</b> Cheese Omelet with a Hashbrown Patty</p> <p><b>LUNCH:</b> Crispy Chicken Sandwich Teriyaki Beef Stir Fry with Brown Rice Pasta Alfredo Turkey and Cheese Sandwich on whole wheat bread</p>	<p><b>12</b></p> <p><b>BREAKFAST:</b> Turkey Sausage Wrapped in a Whole Grain Pancake</p> <p><b>LUNCH:</b> Beef Tacos Chicken Quesadilla Toppings: shredded cheddar cheese, sour cream, salsa, shredded zucchini and salsa Baked Potato Bar Toppings: shredded cheddar cheese, sour cream, salsa, shredded zucchini and salsa Turkey &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>13</b></p> <p><b>BREAKFAST:</b> Homemade Muffins</p> <p><b>LUNCH:</b> Cheese Pizza Pepperoni Pizza Sausage Pizza Lochmead Yogurt Parfait Served with Lochmead's Fruit Only Ham &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>14</b></p> <p><b>BREAKFAST:</b> Yogurt Parfait with Local Granola</p> <p><b>LUNCH:</b> Whole Grain Baked Chicken Com Dog Three Cheese Italian Flatbread Melt Chicken Parmesan Flatbread Melt Chicken Fajita Salad Served with Lochmead's Fruit Only</p>	<p><b>15</b></p> <p><b>BREAKFAST:</b> Whole Grain Cinnamon Rolls</p> <p><b>LUNCH:</b> Hamburger or Cheeseburger w/ Roasted Red Potatoes Veggie Burger w/ Roasted Red Potatoes Cheese Quesadilla -Cookie Day-</p>
<p><b>18</b></p> <p><b>BREAKFAST:</b> Whole Grain Pancakes</p> <p><b>LUNCH:</b> Hand Rolled Bean &amp; Cheese Burrito Chicken Nuggets with a whole wheat roll Wiener Wrap Tuna Sandwich on whole wheat bread</p>	<p><b>19</b></p> <p><b>BREAKFAST:</b> Whole Grain Waffles</p> <p><b>LUNCH:</b> Cheese Pizza Pepperoni Pizza Homemade Vegetarian Chili served with brown rice Ham &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>20</b></p> <p><b>BREAKFAST:</b> Egg &amp; Cheese on an English Muffin</p> <p><b>LUNCH:</b> Bean &amp; Cheese Enchiladas French Toast Sticks Caesar Salad Turkey and Cheese Sandwich on whole wheat bread</p>	<p><b>21</b></p> <p><b>BREAKFAST:</b> Whole Grain French Toast Sticks</p> <p><b>LUNCH:</b> Cheese Pizza BBQ Chicken Pizza Spaghetti with Marinara Sauce Turkey &amp; Cheese Sandwich Casablanca Hummus served with a whole grain bagel and full cup</p>	<p><b>22</b></p> <p><b>BREAKFAST:</b> Whole Grain Cinnamon Rolls</p> <p><b>LUNCH:</b> Hamburger or Cheeseburger w/ Roasted Red Potatoes Veggie Burger w/ Roasted Red Potatoes Macaroni and Cheese -Cookie Day-</p>
<p><b>25</b></p> <p>No School</p>	<p><b>26</b></p> <p><b>BREAKFAST:</b> Turkey Sausage Wrapped in a Whole Grain Pancake</p> <p><b>LUNCH:</b> Beef Tacos Chicken Quesadilla Toppings: shredded cheddar cheese, sour cream, salsa, shredded zucchini and salsa Baked Potato Bar Toppings: shredded cheddar cheese, sour cream, salsa, shredded zucchini and salsa Turkey &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>27</b></p> <p><b>BREAKFAST:</b> Homemade Muffins</p> <p><b>LUNCH:</b> Cheese Pizza Pepperoni Pizza Sausage Pizza Lochmead Yogurt Parfait Served with Lochmead's Fruit Only Ham &amp; Cheese Sandwich on whole wheat bread</p>	<p><b>28</b></p> <p><b>BREAKFAST:</b> Yogurt Parfait with Local Granola</p> <p><b>LUNCH:</b> Whole Grain Baked Chicken Com Dog Three Cheese Italian Flatbread Melt Chicken Parmesan Flatbread Melt Chicken Fajita Salad Served with Lochmead's Fruit Only</p>	<p><b>29</b></p> <p><b>BREAKFAST:</b> Whole Grain Cinnamon Rolls</p> <p><b>LUNCH:</b> Hamburger or Cheeseburger w/ Roasted Red Potatoes Veggie Burger w/ Roasted Red Potatoes Cheese Quesadilla -Cookie Day-</p>

## Entrées Served Daily

- 4 Entrées Daily
- Fresh Salads and/or Deli Sandwich
- Vegetarian Entrée
- Fruits and Vegetable Offering Bar



Lochmead 1% or Fat Free Milk  
Non-Fat Chocolate Milk is served on Mondays and Fridays  
*subject to change due to no school days*

## MENU IS SUBJECT TO CHANGE

### Symbols



Pork  
Vegetarian  
Oregon Grown / Made

### ELEMENTARY MENU PRICES

	Breakfast	Lunch
Free:	\$0.00	\$0.00
Reduced:	\$0.00	\$0.40
Paid:	\$1.40	\$2.90
MHC:	\$ .50	\$ .50

### Local Products on this Menu:

- Tortilla Chips from Carmen's
- Lochmead Milk and Yogurt
- Harvest of the Month: Kale from Johnson Farms - Eugene
- Local Bagels from *Bagel Sphere*
- Homemade muffins made with Canas Country Mill flour
- Hummus from Casablanca
- Grizzlies Brand Granola

This menu from Eugene 4J School District illustrates that marketing local products can be as simple as marking them on monthly menus.



# Index of Resources

## Introduction

### Local Food Systems: Clarifying Current Research | NC State Extension Publications

The benefits of local food systems is determined by how local food is defined, and subsequently how local food is grown or raised, distributed, and consumed.

<https://content.ces.ncsu.edu/local-food-systems-clarifying-current-research>

### PURCHASING MICHIGAN PRODUCTS: A STEP-BY-STEP GUIDE

A guide on the best ways to incorporate Michigan foods into a school meal program.

<https://www.canr.msu.edu/foodsystems/uploads/files/mi-purchasing-guide.pdf>

## Chapter 1: Buyers

### *General Resources*

#### Minneapolis Public Schools Farm to School Toolkit

A case study of how Minneapolis Public Schools buys fresh, sustainably-grown produce from small and medium-sized local farmers.

[https://nutritionservices.mpls.k12.mn.us/uploads/2016\\_mps\\_farm\\_to\\_school\\_toolkit.pdf](https://nutritionservices.mpls.k12.mn.us/uploads/2016_mps_farm_to_school_toolkit.pdf)

#### Procuring Local Food for Child Nutrition Programs Toolkit

A guide, released by the USDA, presents the information and resources that districts need to purchase local products for the school cafeteria. This information includes menu planning basics, the fundamental principles of procurement, the many potential sources of local products, and the variety of mechanisms that can be used to procure these products.

[https://fns-prod.azureedge.net/sites/default/files/f2s/F2S\\_Procuring\\_Local\\_Foods\\_Child\\_Nutrition\\_Prog\\_Guide.pdf](https://fns-prod.azureedge.net/sites/default/files/f2s/F2S_Procuring_Local_Foods_Child_Nutrition_Prog_Guide.pdf)

## Why should buyers procure local food?

### Farm to School Overview

A detailed document of the benefits of farm to school.

<http://www.farmtoschool.org/Resources/BenefitsFactSheet.pdf>

### Templates

GEOGRAPHIC PREFERENCE: WHAT IT IS AND HOW TO USE IT

A document from the USDA detailing geographic preference and how it's useful as a tool in deciding where and from whom to purchase food.

<https://fns-prod.azureedge.net/sites/default/files/f2s/GeoPreference.pdf>

## Buying Local at Different Levels: How Do I Start & How Do I Grow?

### *Beginner*

#### Apple Crunch

Apple Crunch, or the Great Lakes Apple Crunch, traditionally happens in October during farm to school Month. This is a one day event where your learning environment would procure local apples and all crunch into them at the same time.

<https://cias.wisc.edu/applecrunch/>

#### Indiana Local Food Day

### *Intermediate*

#### Chef Ann's Foundation

The Chef Ann foundation offers a variety of resources for school food service including recipes, equipment, professional development, and more. As a wealth of information and programs, we encourage you to look around on Chef's Ann's website for resources and information on your farm to school journey.

<https://www.chefannfoundation.org/>

### New School Cuisine

New School Cuisine is the first-ever effort by public school cooks who wrote a hands-on cookbook for their peers. It is the only cookbook that is for school cooks, by school cooks; includes only kid-tested recipes; and features local, seasonal ingredients and farm to school resources.

<https://vermontfarmtoschool.org/resources/new-school-cuisine-cookbook-nutritious-and-seasonal-recipes-school-cooks-school-cooks>

### The Lunch Box

Ran by the Chef Ann Foundation, the Lunch Box provides fantastic recipes for all meal patterns and types scaled for Food Service Directors.

<https://www.thelunchbox.org/recipes-menus/recipes?s=eyJwYWdlIjoxLCJzZWZyY2giOm51bGwslmNhdGVnb3J5IjpudWxsLCJzb3J0IjoibmFtZSIsImZvcmlhdCI6ImNhcmQifQ%3D%3D>

### USDA Team Nutrition

A collection of food service recipes for a variety of ages, groups, and focused foods all standardized and approved by the USDA.

<https://www.fns.usda.gov/tn/team-nutrition-recipes>

### Healthy School Recipes

This searchable database provides links to numerous recipes for nutritious school meals, all scaled for food service.

<https://healthyschoolrecipes.com/>

### John Stalker Institute of Food and Nutrition

From Framingham State University, the John C. Stalker institute has put together a great list of resources, including some from above, for healthy school-based meals.

<https://johnstalkerinstitute.org/resource/recipes/>

### *Advanced*

#### Local Meat in Schools

Communities across the nation are proving that getting local meat in school cafeterias is not only possible, but practical and feasible as well. This fact sheet released by the USDA presents examples, tips, and information for putting local meat on school menus.

<https://fns-prod.azureedge.net/sites/default/files/f2s/LocalMeat.pdf>

## School Integration

### NEI Food Council

A YouTube channel with videos about Purdue Extension and Steuben County  
<https://www.youtube.com/channel/UCIWROqMvz9iqbQrLzTLJEIlg/videos>

### Indiana Dairy Association

A virtual farm tour released by the Indiana Dairy Association  
<https://winnersdrinkmilk.com/virtual-farm-tour/>

### Ag in the Classroom

Houses many virtual tours of various types of agriculture, such as egg and poultry farms, pig farms, crop farms, and specialty farms.

<https://www.agclassroom.org/student/virtual/>

## Chapter 2: Producers

### Why Is Selling to Your School Beneficial?

#### Bringing the Farm to School Toolkit

Another helpful resource is the Bringing the Farm to School Toolkit that has been developed by the USDA and the National Farm to School Network. There are several worksheets that can be helpful in planning an approach to school sales that is a good fit for the farm

<http://www.farmentoschool.org/BringingF2S/ProducerWorksheets.pdf>

#### Producer workbook

This resource is part of the larger training and focuses on the producers going through the training. While it might be more impactful if going through the training, there are valuable resources, definitions, etc. that can help you understand the basics of school nutrition.

<http://www.farmentoschool.org/BringingF2S/ProducerWorkbook.pdf>

#### School Business Action Planning Guide

A great appendix from the greater training. This guide helps you understand if selling to schools is the right business move for you.

<http://www.farmentoschool.org/BringingF2S/SchoolBusinessActionPlan.pdf>

### New Entry Sustainable Farming Project Wholesale Resources

Global Growers, in collaboration with the New Entry Sustainable Farming Project, developed this series of one pagers and training manuals to assist immigrant growers with the expansion of their farms. The one pagers and trainings are designed to help farmers understand what they need to do to successfully transition to wholesale markets.

<https://nesfp.org/resources/wholesale-readiness>

### Wholesale Readiness and Direct Market Success Manuals

Family Farmed and Attina Diffley have developed manuals on wholesale readiness [Wholesale Success] and direct sales [Direct Market Success] are fantastic introductions and tools for thinking about whether bulk/wholesale is a good fit for the farm.

<https://familyfarmed.org/farmer-training/>

### USDA Selling to Local Schools Fact Sheet

USDA's one-page guide and high level overview about selling to schools.

<https://fns-prod.azureedge.net/sites/default/files/f2s/SellingLocal.pdf>

## Food Safety and Wholesale Readiness

### Safe Produce Indiana Home

A document about produce safety alliance trainings and food safety by gathering resources that address the FDA, the FSMA, the Produce Safety Rule, the Produce Safety Alliance, water safety and compliance training.

<https://ag.purdue.edu/extension/safeproduce/Pages/default.aspx>

### FOOD SAFETY RULES

This flowchart is intended to help you determine whether and to what extent a farm or food business might be impacted by the Food Safety Modernization Act (FSMA) rules.

[https://sustainableagriculture.net/wp-content/uploads/2016/02/2016\\_2-FSMA-Final-Rule-Flowchart-V3.pdf](https://sustainableagriculture.net/wp-content/uploads/2016/02/2016_2-FSMA-Final-Rule-Flowchart-V3.pdf)

### Health: Food Protection: Indiana Produce Safety Program

This document provides more information on the Indiana administration of FSMA compliance.

<https://www.in.gov/health/food-protection/farm-produce-safety-initiative/>



# Chapter 4: Community Engagement

## Why engage the community/stakeholders?

### AGRICULTURAL PRODUCERS' TOOLKIT: BRINGING THE FARM TO SCHOOL, FACILITATOR GUIDE

A document that assists in facilitating Local Producer Training organized into four training modules.

<http://www.farmtoschool.org/BringingF2S/FacilitatorGuide.pdf>

### FARM TO SCHOOL

A detailed document of the benefits of farm to school.

<http://www.farmtoschool.org/Resources/BenefitsFactSheet.pdf>

### Purdue Extension Overview Tip Sheet.

Purdue Extension is the outreach link between local communities, the land grant universities, and the United States Department of Agriculture (USDA). This promotes the wellbeing and productivity of people throughout the United States. For more information, you can visit:

<https://extension.purdue.edu/4h/Shared%20Documents/4-H%20Council%20Handbook%20Tip%20Sheets/Purdue%20Extension%20Overview%20Tip%20Sheet.pdf>

# References

1. Local food systems: Clarifying Current Research. NC State Extension. <https://content.ces.ncsu.edu/local-food-systems-clarifying-current-research>.
2. Meter, K. (2013). Southwest Indiana Local Farm & Food Economy. Crossroads Resource Center.
3. The Benefits of Farm to School. National Farm to School Network. (2020, May). <http://www.farmentoschool.org/Resources/BenefitsFactSheet.pdf>
4. Dunning, R. (2011). Research-Based Support and Extension Outreach for Local Food Systems. Center for Environmental Farming Systems.
5. Indiana (IN). USDA. <https://farmentoschoolcensus.fns.usda.gov/census-results/states/in>.
6. Christensen, L., Jablonski, B., Stephens, L., & Joshis, A. (2017, September). Economic Impacts of Farm to School: Case Studies and Assessment Tools. National Farm to School Network. <http://www.farmentoschool.org/Resources/EconomicImpactReport.pdf>.
7. Briefs & fact sheets. Michigan State University Center for Regional Food Systems. <https://www.canr.msu.edu/foodsystems/resources/brief/>.
8. Nicholson, C. F., Gómez, M. I., & Gao, O. H. (2011). The costs of increased localization for a Multiple-product food supply chain: Dairy in the United States. *Food Policy*, 36(2), 300–310. <https://doi.org/10.1016/j.foodpol.2010.11.028>
9. Klavinski, R. (2013, September 13). 7 benefits of eating local foods. Michigan State University MSU Extension. [https://www.canr.msu.edu/news/7\\_benefits\\_of\\_eating\\_local\\_foods](https://www.canr.msu.edu/news/7_benefits_of_eating_local_foods).
10. Farm-to-Fork program coming to Tippy Valley. News Now Warsaw. (2016, November 17). <https://www.newsnowwarsaw.com/farm-fork-program-coming-tippy-valley/>.