

ADVANCING SCHOOL FOOD PROCUREMENT



Driving Values-Based Purchasing
through Competitive Solicitations

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The Common Market is a nonprofit wholesale food distributor that has partnered with schools and other institutions to meet their local sourcing needs and grow their values-based purchases since 2008. The Common Market believes that improving food sources can influence public health outcomes, boost regional economies, mitigate climate change, and improve racial equity. The nonprofit partners with both farmers and communities from procurement through delivery, so that schools, hospitals, cities, and businesses can realize the full value of a healthy food system. Since its founding, The Common Market has partnered with more than 300 sustainable family farms to deliver food representing 58 million meals.

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Executive Summary



EXECUTIVE SUMMARY

Introduction

Growing Opportunities for Values-Based School Food Procurement

Increasingly, school food authorities (SFAs) and districts are rethinking the “business as usual” approach to school food procurement. As seen in examples from across the country, SFAs are aligning their values with their procurement practices—considering public resources as a means to impact the greater good.

Without the inclusion of specific values, procurement often results in public contract awards going to vendors who can provide the required goods and/or services at the lowest cost. SFAs are continuing to broaden the scope of what it means for a good or service to meet their needs by incorporating standards that align with core values, such as environmental sustainability, transparency, humane treatment of animals, fair labor practices, and racial equity.



For some schools, the consideration of values-based criteria in bids—from supply-chain working conditions to where and how food is grown—is a new and unfamiliar approach.

Advancing School Food Procurement: Driving Values-Based Purchasing through Competitive Solicitations draws on the expertise of school food leaders, advocates, and supporters working to incorporate more local and values-based foods and related programming into school meal programs.

This resource is intended to inspire and support all schools interested in shifting toward or growing opportunities for values-based procurement through expert key findings, tangible tips, case studies, and real-world competitive solicitations and contract language examples. The report is meant to supplement existing resources for SFAs.

Why Now for Values-Based Procurement

School meals provide critical nutrients to more than 30 million students each day. In turn, the volume of food procured to support meal programs make schools one of the largest public purchasers in the nation¹.

The current health and economic crisis underscored by COVID-19 resurfaced the importance of healthy food access, and supporting local and regional food systems—the same ones that reliably sourced food reaching our institutions and communities when larger supply chain disruptions left us vulnerable.

The pandemic forced school meal programs, and the resilient teams behind them, to pivot alongside the rest of the world. They more than rose to the occasion, meeting food insecurity needs with

innovation, flexibility, and care, oftentimes relying on local sourcing. And, it reinforced the critical role schools hold as anchors in the community.

The time is now for schools to be bold and creative when considering their purchasing power and their responsibilities in serving their community. The basic mechanisms by which institutions like schools write contracts, create incentives, and develop market opportunities can have tremendous impact on local farmers, communities, and the environments that they support.

Taking advantage of an institution's opportunity to align their values and their purchasing practices could address economic disparities among farming communities, support climate-smart production practices, drive local job creation, spur community engagement, and enhance student health.

***Advancing School Food Procurement: Driving Values-Based Purchasing through Competitive Solicitations* aims to uncover some of the possibilities within school food contracts and inspire a more inclusive, sustainable, and equitable food system for all.**

¹ **USDA Economic Research: National School Lunch Program**

Project Limitations

School food procurement is a highly regulated complex system with numerous objectives. Paramount among them are childhood nutrition and low cost. This report is not intended to provide a standard procurement template or a one-size-fits-all approach to values-based purchasing. Nor is it a guide to the basic rules of procurement as many such resources already exist. Instead, this report focuses on lifting up innovative examples of formal, competitive solicitations to demonstrate how different school districts are making practical strides in values-based procurement.

We hope that **school food leaders, advocates, and supporters of values-based procurement** find inspiration in these examples and can use them to start new conversations with key stakeholders, including vendors, district leadership, procurement officers, students, families, and food service staff. SFAs and districts should review any changes they wish to make with their procurement office to ensure they meet all local, state, and federal procurement rules and regulations.

Given the highly contextual nature of school food procurement and the variability of proven practices, this report does not make specific recommendations, nor does it evaluate outcomes. Rather, the examples demonstrate how different SFAs are prioritizing certain values throughout the procurement process.



Racial Equity Language

Research conducted for this resource scanned existing values-based food solicitations from across the United States. While the findings exemplified values across a wide spectrum, examples centering racial equity are sparse. Prioritizing racial equity in procurement practices supports economic inclusion and long overdue opportunity for farmers of color, with the potential to strengthen communities socially and economically overall. As values-based procurement continues to grow and expand in practice, so too should the examples including historically and socially disadvantaged farming groups. Future iterations of this resource will work to include these examples as a means to inspire contracting for equity. School food leaders responsible for or aware of solicitations that prioritize racial equity are encouraged to notify the authors of this resource.

See Appendix for ways to get in touch.

Methods

This project explores two main research questions:

- 1. How can contract language and the competitive solicitation process support local sourcing and values-based procurement?**
- 2. What are the key factors and processes that allow SFAs to adopt and maintain values-based procurement practices?**

These questions were answered through a mix of primary and secondary research using primarily qualitative methods. Primary research consisted of 35 open-ended expert interviews—conducted via phone or video calls during July and August of 2021—and a review of more than 35 original solicitation documents. Secondary research consisted of surveying existing information and resources, including academic and non-academic websites, reports, procurement guides, and templates related to local sourcing and values-based procurement for school meal programs.

The expert interviews provide additional context for and insight into how districts and SFAs implement a values-based approach to school food procurement. Primarily identified through The Common Market's existing network and subsequent referrals, interviewees represent a diversity of perspectives and experiences from SFAs across the United States,

including California, Washington, Texas, Minnesota, Georgia, New York, New Jersey, Connecticut, and Washington, D.C. Individuals interviewed for this report also include school nutrition directors, food service management company staff, university extension agents, state department of agriculture and education staff, USDA farm to school staff, local producers and food hub representatives, nonprofit program partners, and other values-based procurement experts.

The primary solicitations reviewed for this guide were competitive bids for produce, beef, and food service management companies from SFAs of varying sizes and geographies. This report focuses specifically on the competitive procurement process; as such, most featured solicitations are Request for Proposals (RFP), though the sample does include an Invitation for Bid (IFB) and a Request for Quote (RFQ). Analysis of the solicitations involved identifying and extracting values-based language and practices from each section of the solicitation.

The solicitation sample was compiled from existing documents provided by The Common Market, requests from interviewees to share original solicitations, and internet searches to identify publicly available solicitations. For a complete list, see the **Solicitation References** table.

How to Use this Report

This report has two main sections. The first is a compilation of **key findings from expert interviews**, a series of open-ended conversations with individuals well versed in local sourcing and values-based procurement. The second section provides relevant **examples of original solicitation and contract language** that support values-based procurement practices.

This report is designed for the reader to find and use what is most relevant to them. Below are the main elements of this report; click on the links below to jump ahead to that section.

Findings from Expert Interviews

Click here to review key findings from expert interviews, which are organized across five main themes relating to the implementation of values-based procurement practices.

Finding Vendors: Example solicitations for values-based food procurement

Click here to navigate to the solicitation examples, which are organized according to the basic sections of a solicitation.

Policy Support

Click here to view examples that reference policies supporting values-based procurement practices.

Appendix: Solicitation References

Click here to jump to a table of all solicitation references and examples organized by category (e.g., produce), solicitation type (e.g., RFP), geography, and school-district size.

Additional Resources

Click here to view a list of additional resources in the following categories:

- *Procurement Rules and Regulations, Tools & Templates*
- *Procurement Policy Research & Reports*
- *Contracting with Food Service Management Companies for Local Procurement*
- *Data Collection, Evaluation & Impact Reporting*
- *Identifying Farm to School Peers and Networks*

*For an optimal user experience, we recommend **downloading this resource and viewing it in a PDF reader.***

You will see the icons below sprinkled throughout the resource. They are meant to identify the major contract-specific solicitation examples:



Aggregator/Distributor—Contracts that target traditional produce or broadline distributor vendors.



Food Service Management Company (FSMC)—Contracts for a commercial enterprise or nonprofit organization to manage aspects of school food service.



Seasonal Produce Bid—Contracts that are structured to support Harvest of the Month or seasonal produce opportunities. Often, these are distinct from traditional produce or broadline distributor awards.



Helpful Definitions

Best Value: A method for evaluating bids in which the contracting officer uses various criteria, including the capabilities of the bidder, to determine which offer is in the best overall interest of the buyer.²

Forward Contracting: Agreements that are set up in advance of harvest between buyers and producers. Forward contracts are a means for producers to guarantee a market for products, as well as for buyers to guarantee prices and other specifications for products they wish to source locally on a regular basis or in a larger quantity³.

Geographic Preference (GP): Geographic preference may be used for the purchase of unprocessed,⁴ locally grown or locally raised agricultural products. Geographic preference can be used as a criterion but in the procurement process but not as a specification. *Additional information and resources are listed at the end of this document.*

Harvest of the Month (HOM): A program where the SFA features a different locally sourced item each month. HOM may include produce and non-produce items, which can be featured in the entrée, as a side, on the salad bar, and/or in taste tests. HOM programs typically include special marketing and promotion or other educational activities.

Interlocal Agreement: A written agreement between two government agencies. It allows one agency to join an existing agreement with another agency, which is sometimes referred to as “piggybacking.”⁵

Invitation for Bid (IFB): A solicitation used in formal procurement where the primary consideration is cost. The contract is awarded to the responsive and responsible respondent—the entity that responds to the IFB, also referred to as a bidder, offerer, or vendor—whose price is the lowest.⁶

2 Glossary of Government Contracting Terms. United States Department of Agriculture. Available from <https://www.usda.gov/smallbiz/glossary#S>

3 Vermont FEED Farmer FAQ. Available from <https://vtfeed.org/sites/default/files/imce/uploads/Farmer%20FAQs%20for%20Selling%20to%20School%20Nutrition%20Programs%20VTFEED.pdf>

4 USDA definition of unprocessed agricultural products available from <https://www.fns.usda.gov/cn/geographic-preference-procurement-unprocessed-agricultural-products#:~:text=In%20our%20view%2C%20for%20purposes,that%20retain%20their%20inherent%20character>

5 Ibid.

6 Procurement Vocabulary 101. 2018. Department of Child Nutrition Services, Washington Office of Superintendent of Public Instruction. Available from <https://www.k12.wa.us/sites/default/files/public/childnutrition/pubdocs/procurementvocabularyreferencesheet.pdf>

Local: SFAs can define local however they see fit based on market conditions and program needs. There is no federal definition of local.⁷

Procurement: The process of purchasing goods and services.

Purchasing Thresholds:

- **Micro-Purchase Threshold:** <\$10,000 (Federal). Program operators may self-certify a threshold of \$50,000⁸. Micro-purchases enable SFAs to purchase supplies or services without soliciting competitive quotes, if the school considers the price reasonable. When using the micro-purchase option, schools must distribute micro-purchases equitably among qualified suppliers; develop written specifications and required terms, conditions, and contract provisions; and, document all purchases.
- **Small Purchase Threshold:** <\$250,000 (Federal). Small purchases enable SFAs to use the informal procurement method. The informal method

requires schools to provide vendor(s) with written specifications, to acquire bids from at least three vendors, to award a contract to the most responsive and responsible vendor at the lowest price, and to document all purchases.

- **Formal Purchase Threshold:** \$250,000 or greater (Federal).⁹ A formal procurement requires an Invitation for Bid (IFB) or a Request for Proposal (RFP). All activities related to the IFB or RFP must be documented and available for review.¹⁰
- *Note:* All purchasing thresholds included here are federal thresholds. States and localities may have more restrictive thresholds.

Request for Quote (RFQ): A solicitation used in informal procurement where price is the primary consideration. An RFQ must include a detailed description of and specifications for the products or services needed, as well as any applicable contract provisions required by local, state or federal procurement regulations (e.g., the Buy American Provision).¹¹

⁷ From Institute on Child Nutrition. Procuring Local Foods for Child Nutrition Programs. Available from: <https://theicn.org/icn-resources-a-z/procuring-local-foods-for-child-nutrition-programs/>

⁸ USDA Micro-Purchase memo in 2 CFR 200.320(a)(1) 2021. Available from <https://www.fns.usda.gov/cn/updates-federal-micro-purchase-threshold>

⁹ From Institute on Child Nutrition: On October 30, 2019, the U.S. Department of Agriculture, Food and Nutrition Service published the Memorandum SP20 CACFP07 SFSP06-2019 “Revised, Federal Micro-Purchase and Simplified Acquisition Thresholds”. This memorandum supersedes SP01 CACFP01 SFSP01-2013. The thresholds under federal financial assistance awards are increased as follows: the federal micro-purchase threshold increased from \$3,500 to \$10,000 and the federal simplified acquisition threshold (formerly known as the federal small purchase threshold) increased from \$150,000 to \$250,000. This guidance applies to all federal micro-purchase threshold and federal simplified acquisition threshold figures referenced throughout the following documents. The U.S. Department of Agriculture is in the process of updating these documents. For questions, please reach out to sm.fn.farmtoschool@usda.gov.

¹⁰ Ibid.

¹¹ Ibid.

Request for Proposal (RFP): A solicitation used in formal procurement where several factors are used to evaluate the received proposals. These evaluation factors must be outlined in terms of relative importance, and cost/price must be the primary factor. A contract is awarded to the responsive and responsible respondent who receives the highest score as a result of the evaluation.¹²

School Food Authority (SFA): School food authorities are the entities designated by school districts as responsible for operating school meal programs. *Throughout this report, the terms “SFA” and “program” are used interchangeably.*

Solicitation: The process of communicating procurement requirements and requesting responses from interested vendors.¹³

Values-Based Procurement: In this report, values-based procurement is defined as an approach to purchasing that targets specific values—outside of lowest cost—throughout the solicitation process.



These values, designed to meet a specific program need or priority, are reflected in the types of products an SFA seeks to procure, as well as in the characteristics of the producer(s) or vendor(s). Certain values-based procurement strategies may also make the solicitation process itself more inclusive of and/or accessible to a wider range of products, producers, and vendors.

¹² Procurement Vocabulary 101. 2018. Department of Child Nutrition Services, Washington Office of Superintendent of Public Instruction. Available from <https://www.k12.wa.us/sites/default/files/public/childnutrition/pubdocs/procurementvocabularyreferencesheet.pdf>

¹³ Glossary of Government Contracting Terms. United States Department of Agriculture. Available from <https://www.usda.gov/smallbiz/glossary#S>

School Food Procurement Basics

School food authorities that receive federal reimbursement for their meal programs are required to follow federal procurement rules—as well as any applicable state and local procurement regulations—when purchasing goods or services for school meal programs. There are five basic steps of the procurement process: planning, drafting specifications, advertising the solicitation, awarding the contract, and managing that contract.

See **Additional Resources** to learn more about school food procurement rules and regulations.

Throughout this process, SFAs must abide by the principles of procurement, including full and open competition, to ensure fairness, integrity, and the efficient use of tax-payer dollars. In accordance with these principles, awarded vendors must be deemed responsive and responsible, meaning they have met the stated terms and conditions, are capable of successfully performing the solicitation's outlined duties, and can successfully fulfill the terms of the contract.

Three main purchasing thresholds, each of which involves a different degree of competition, determine how a SFA can source food:



SFAs must abide by the principles of procurement, including full and open competition, to ensure fairness, integrity, and the efficient use of tax-payer dollars.

- the **micro-purchase threshold** (requires no competition),
- the **small purchase threshold** (requires informal competition), and
- the **competitive bid threshold** (requires formal competition).

SFAs must follow the federal thresholds or any lower thresholds imposed at the state or local level. This report primarily focuses on formal competitive solicitations in the form of a Request for Proposal (RFP).

Key Insights From Expert Interviews

SFAs seek to support and target a wide range of values.

While buying local is the most common value reflected in this report, SFAs are increasingly expanding the types of values they seek to support through their procurement practices.

Success lies in knowing your community.

To be effective, values-based procurement should align food service capacity with local product availability, vendor capabilities, and school community priorities. Building a vision and strategy around these elements helps SFAs develop a sustainable model of values-based procurement success.

Dedication by food service leadership and support from partners is key.

Values-based procurement is a departure from the status quo. It can take extra time and increased capacity to implement necessary changes, so key stakeholder engagement is critical.

Solicitation and contract language is only one piece of the puzzle.

While procurement language can help drive market changes, generating buy-in from district and SFA leadership, eliciting positive pressure from students and families, and building relationships with new vendors are also necessary to sustain a values-based procurement program.

Key Insights From The Competitive Solicitation Review

Offer line-by-line or partial bid opportunities to expand competition and market access for non-traditional vendors.

This offers smaller, local, or historically underrepresented vendors who align with a program's values a greater chance to compete against larger traditional vendors.

Clearly define and align values with technical requirements, product specifications, and terms of the contract.

The solicitation should clearly demonstrate how values are integrated with the needs of the SFA and what is required of bidders to align with those values.

Build accountability into the contract.

This can be done through a required values-based purchasing commitment, reporting standard, audit, or other accountability mechanism.

The next sections of the report explore these findings in more detail, providing examples from school programs across the United States that are actively engaging in local sourcing and values-based food procurement practices.

Findings from expert interviews

FINDINGS FROM EXPERT INTERVIEWS

Expert interviews provide insight into the process of implementing a values-based approach to school food procurement and offer additional context to the solicitation document review.

Each interview began with the same open-ended question: *“Can you tell me about your experience with local sourcing and other values-based procurement?”* All follow-up questions were designed to probe interviewees for additional details, valuable insights, and key learnings, especially as these pertained to solicitation or contract language; key process steps, challenges, and successes; stakeholder involvement; and impact tracking and reporting; Detailed interview notes were analyzed to extract and distill the key themes and findings discussed in this report.



The findings from these interviews are organized under five key themes:

1. Factors that influence local and values-based procurement
2. Key steps in the values-based procurement process
3. Common strategies to support values-based procurement
4. Common challenges to values-based procurement
5. Practices for tracking and demonstrating impact

1 Factors that influence local and values-based procurement

Understanding these factors at the SFA level helps determine those context-specific strategies best suited to support the values-based procurement process.

The USDA's guide to **Procuring Local Foods for Child Nutrition Programs** identifies seven main factors that influence the purchasing environment: budget, kitchen capacity and infrastructure, staffing, local policies, student preferences, access to vendors and farmers, and delivery requirements.¹⁴ Expert interviews surfaced additional variables that impact local sourcing and values-based purchasing, including:

- **Solicitation timing and frequency** — *Do your contract periods line up with the growing season? Do the vendors you're looking to target know about when your contracts are released?*
- **Contract size** — *Do you have the ability to offer multiple contracts and allow vendors to participate at various volumes?*
- **Sourcing-relationship type (direct or indirect)** — *Do you hold direct purchasing relationships, or do you rely on food-service management companies to drive sourcing decisions?*
- **Product availability** — *Is there sufficient supply and vendor capacity to meet the target values?*
- **SFA leverage** — *Do you have the purchasing power to influence your vendors?*
- **Geography** — *Do the products that you're looking to source exist within your region? Does the physical location(s) of your SFA pose any opportunities or barriers to reaching values-based purchasing goals?*
- **Internal distribution capacity** — *Do you have any distribution capacity within your operation? How might this support bringing on more small, values-aligned vendors?*
- **Administrative capacity** — *Do you have the staff capacity to take on this work?*
- **Leadership buy-in and support** — *Do you have buy-in from your leadership and decision-makers to approach purchasing from a values perspective beyond cost?*

¹⁴ USDA, 2022. Procuring Local Foods for Child Nutrition Programs. Available at <https://theicn.org/icn-resources-a-z/procuring-local-foods-for-child-nutrition-programs/>

- **Community partnerships** — *Do you have a network of community partners that can support you? Who are they and what sort of resources can they provide?*
- **Core values** — *Does your SFA have core values that could align with new approaches to purchasing?*
- **Experience sourcing local and other values-based products** — *Is this work new to you, or have you had the experience of starting small, growing, and learning?*

2 Key steps in the values-based procurement process

TIP | Use *The Center for Good Food Purchasing Impact Hub - Impact Calculator* to explore the potential impacts of shifting procurement dollars for your SFA.

In almost every case, interviewees noted that changes to the procurement process—i.e., shifting from a lowest-cost, business-as-usual approach to one that integrates core values into purchasing decisions—**required parallel changes in organizational culture.** It is important to remember that change can be slow. Many interviewees described learning as they go, starting small, and building on small wins over time.

Interviewees identified the following steps to help SFAs bring about the changes necessary to support values-based purchasing:

1. **Build a team of core partners and community support**¹⁵:

Gather stakeholders who can provide technical assistance or additional capacity to support a

values-based procurement process and ensure the ongoing sustainability of the program. Potential partners include local or state-wide farm to school organizations and supporters, such as your state department of agriculture or education's farm to school program staff, local university extension staff, local wellness councils, local food policy councils, parents, teachers, and students.

If possible, hire a Farm to School Coordinator to support and sustain the work.

2. **Envision the program you want to have:**

Start by considering key questions:

- What are the program's core values?

¹⁵ Farm to School 101: Available from: https://www.chicopeefresh.com/uploads/3/9/4/5/39451517/farm_to_school_101_guide_3_.pdf

- What matters most to students, parents, food service staff, and the school community?
- How will products be used and how much will you need?
- What is currently achievable? What are your future goals? Are they reasonable, cost-effective, and attainable?

Design the bid process and contract language around the answers to these questions.

3. **Build support from leadership and key district or SFA staff:**

Anticipate the benefits of local and values-based procurement to help build your case and generate buy-in from the superintendent, school board, and business or procurement office. Potential benefits include positive environmental impacts, improved student health and wellness, increased meal participation, access to additional government or philanthropic funding opportunities, and support for the local farm and food business community.

Explore the potential impacts of shifting procurement dollars for your SFA using the **Center for Good Food Purchasing Impact Hub – Impact Calculator**.

4. **Assess current practices:**

- What is the current kitchen and staff capacity?
- What is the administrative capacity to manage new or multiple vendors?
- How will product changes affect other aspects of the food service program?
- What else is needed to achieve the food service goals?

5. **Conduct market research:**

- What local products and vendors are available in your city, town, state, or region?
- Are products available in sufficient quantities to meet your SFA's needs?
- Do local vendors have sufficient storage and distribution capacity to serve your programs?
- What barriers to bid opportunities exist for local vendors and how could they be addressed?

6. **Plan and issue the solicitation:**

- Proactively conduct outreach to potential bidders. Local farms may not know where or how to search for bid opportunities.
- Host pre-bid meetings and extend invitations to

small, local, or first-time bidders to help demystify the process and answer questions. *To maximize farmer attendance, keep in mind timing—both the growing season and the time of day—when scheduling pre-bid meetings.*

- Enlist partners to provide technical assistance to first-time bidders.
- Engage the support of your state agency’s Farm to School coordinators and staff.
- Think creatively about how to target key values through technical requirements and product specifications.
- When using an RFP as the procurement method, use a points system to score bids and give weight to the most important factors that tie back to your program’s core values.

7. **Manage contracts to ensure vendor accountability while allowing for flexibility:**

- Allow for flexibility due to changes in local product availability.
- Work with vendors to find mutually agreeable ordering and delivery logistics.
- Collect sourcing data to track progress against values and goals.



8. **Promote your successes and achievements.**

Tell your farm to school story to students, parents, school boards, policymakers, and the local community. Sharing your successes can even foster a broader advocacy movement for more policies and programs that support values-based procurement on the local or state level!

3 Common challenges to values-based procurement

Prioritizing the values that best represent your school program

Interviewees shared that it can be challenging to find vendors and products that meet all of an SFA's values; as a result, the SFA may have to pick and choose which values to prioritize for a given solicitation. Moreover, some values, such as fair labor practices and farm ownership or identity, are harder to verify and score.

Distribution, staffing, and contracts

Other common challenges include the limited distribution capacity of local farms and the increased administrative capacity needed to manage multiple vendors and contracts. In fact, nearly every interviewee noted that, given the additional work involved and the extra staff-support needed, values-based procurement requires a strong commitment from the food service director. This is why starting small—incorporating just one new local vendor, for example—is often the best strategy until the SFA can develop new systems to support their procurement goals.



Values-based procurement requires a strong commitment from the food service director, noted by nearly every food school leader interviewee.

Some interviewees also mentioned challenges specific to food service management companies. Some states, for instance, require SFAs to use standard templates that do not include language to support local sourcing and other values, and it can be difficult to make changes to these templates.

4 Common strategies to support values-based procurement

Despite these challenges, there are many successful approaches to starting and sustaining values-based procurement practices. This section details the most frequently shared and endorsed strategies from the interview process.

Get to know your local farmers and food producers

Getting to know local producers allows SFAs and suppliers to work in partnership around local and values-based procurement goals. Food service directors shared that by engaging with local producers they were able to learn about product availability, how to set up the bid timeline to better align with crop planning, anticipate production volumes, discover new items to include in future bids, learn about local producer's distribution and processing capacities, discover potential barriers that could prevent local producers from bidding on an RFP, and brainstorm potential solutions.

Recognizing and neutralizing those barriers requires forethought and planning. For example, if multiple



REAL WORLD EXAMPLE

The benefits of getting to know your local farmers and food producers

Where: New York

Scenario: A food service director based in New York learned that a local farm cooperative did not bid on a produce RFP because they did not have a way to process whole produce items.

Solution: The food service director made a connection to a local processor.

Outcome: The farm cooperative and local processor developed a partnership that allowed them to respond to future RFPs. Simple outreach performed by the school district made a huge impact!

local farms are needed to grow enough of an item to meet the SFA's need, would the program consider awarding the bid to multiple vendors? If local producers would need to expand production to meet the volume needs required by the SFA, will the

start of the contract period allow enough time to increase production or develop new or additional processing, storage, or distribution capacity? The answers to questions like these can help determine whether or not bid opportunities are accessible to the types of vendors that could help achieve an SFA's local sourcing and values-based procurement goals.

Additionally, engaging local producer communities provides an opportunity for smaller and nontraditional vendors to learn about the SFA's needs and associated bid requirements—from what types of products the SFA is looking to source to key requirements related to food safety, delivery, source identification, and reporting, as well as the basic steps needed to fill out and submit a bid. Relaying this kind of information to local producers—who may be unfamiliar with formal bids or the bidding process—is crucial. **To do so, an SFA can host a “meet and greet” or pre-bid meeting specifically designed to engage small or first-time vendors.**

To learn about local products and vendors in your region that align with SFA values, consider conducting an RFI, or request for information (see **example here from Minneapolis Public Schools**). The results, which include important information about local farmers (e.g., pack size) and distributors (e.g., distribution capacity), can help food service directors

craft a solicitation that doesn't unintentionally prohibit certain local vendors from being eligible for the bid. SFAs can also use these results as justification for proof of sufficient competition when adding new requirements or specifications to an RFP.

Outreach to local producers can take additional time and capacity. Program partners, such as local farm to school supporters, extension offices, and your state education or agriculture agencies, can help by promoting bid opportunities, sharing those opportunities with local producers, or providing SFAs with a list of local farm contacts for direct bid distribution. These network collaborators can also help answer questions and provide technical assistance to small or new bidders.

Align values with bid requirements and scoring criteria

After identifying its core values, an SFA has the opportunity to align the competitive procurement process with specific requirements or evaluation criteria that support the program's values-based goals. For example, a program that wants to center racial equity in its procurement practices could award more points to producers who are socially disadvantaged¹⁶, or farming groups that have been historically subject to racial or ethnic prejudice. (See

¹⁶ The Consolidated Farm and Rural Development Act defines a socially disadvantaged group as one whose members have been subject to racial, ethnic, or gender prejudice because of their identity as members of a group without regard to their individual qualities. USDA regulations further define socially disadvantaged farmers and ranchers (SDFRs) as belonging to the following groups: American Indians or Alaskan Natives, Asians, Blacks or African Americans, Native Hawaiians or other Pacific Islanders, Hispanics, and women.

the **Evaluation Criteria and Scoring** section for additional examples.)

Third-party certifications—e.g., Organic, Certified Humane, or Fair Trade—are another tool for aligning a program’s bid requirements with its key values. If considering alternatives to official third-party certifications to evaluate sustainability or other values-aligned practices, consider what kind of documentation you will require to verify practices. This could include self-certification or checklists provided by the SFA (see the **Vendor Questionnaire** section below for examples).

The **vendor questionnaire** is also an opportunity to gain insights around a vendor’s practices and their alignment with SFA goals and needs. When drafting questions or criteria for the solicitation, consider what the SFA would need to verify the response and if it is reasonable for both bidders to provide and for the SFA to review.

Plan ahead and allow for flexibility

A commitment to values-based procurement means a departure from business as usual; after all, working with and mitigating barriers faced by smaller, non-traditional vendors can require system changes and increased flexibility. Outlined below are ways in which SFAs can adapt existing systems to better suit a values-based procurement model.

- **Product Specifications**

By implementing flexibility around grade standards in their product specifications, SFAs are able to take advantage of more locally produced foods. In particular, if an item is going to be further processed, an SFA can allow for more flexibility in grade and size standards to increase the likelihood that local products will meet their product specifications.

- **The Solicitation Timeline**

When drawing up their solicitation timelines, SFAs with strong local and values-based procurement practices take into account the time necessary to perform farm outreach, hold pre-bid meetings, answer questions, and receive responses from local vendors. Check your state’s seasonality chart to determine what is in season during which months of the school year (here is an **example from Massachusetts**). Programs that conduct the solicitation in the fall months are able to award forward contracts by January, which allows farms to plan their crops accordingly.

SFAs that get familiar with both the general timeline for animal harvesting and processing capacities in their region can plan their bid processes far enough in advance that farmers and ranchers can expand operations, if necessary, to meet their program’s protein needs.

REAL WORLD EXAMPLE

Flexibility at the district level opened doors for Texas rancher looking to connect with Austin schools

Where: Texas

Scenario: Through feedback collected from an annual food service survey, the **Austin Independent School District in Texas** found that its communities wanted to see more locally-sourced foods and grass-fed beef on its menus. Their new RFP sought to identify a grass-fed beef producer that aligned with the values they adopted as part of the Good Food Purchasing Program, including animal welfare and environmental sustainability.

Augustus Ranch based in Yoakum, TX was awarded the RFP, in partnership with regional food distributor The Common Market. The ranch was awarded the contract because it could source-identify, it won a taste test conducted among the school population, and the product aligned along other values-based factors.

The ranch would ideally need to operate on a year's advance notice in order to meet the contract's volume requirements. They mobilized as quickly as possible, though they could not process all the beef upfront. They could commit to a weekly schedule over the course of the 6-month contract.

Solution: The district accommodated smaller delivery volumes on a more frequent basis as the product became available. The Common Market would facilitate monthly pick-ups and deliveries to the schools.



Augustus Ranch, Yoakum, TX

Outcome: If the district maintained strict requirements around delivery volumes and frequency, it is unlikely the rancher would have been able to serve the district. This flexibility provided immense economic benefits to the ranch, while simultaneously meeting AISD's commitments to both animal welfare and environmental sustainability.

Plan ahead and allow for flexibility, continued.

- **Thinking Beyond the School Year**
Many school food programs operate in geographies where there is misalignment between the peak harvest season and the academic year. By including summer meals in their solicitations, however, SFAs have the opportunity not only to bring fresh, local food into schools without growing-season restrictions, but also to support growers through the summer months. See an example of this referenced in the **Introduction** section of our Solicitation Review.
- **Award Methods**
SFAs can make bid opportunities more accessible by allowing vendors to submit partial bids if they can supply only a portion of the total product needed. Some programs allow line-by-line bidding and include an option for vendors to list items not included on the bid item list. By offering flexibility in how vendors can respond to bids and by awarding bids to multiple vendors, SFAs can expand opportunities for smaller, local farms and vendors. Once bids are awarded, SFAs can continue to build in flexibility by menuing a “local item” or “seasonal fruit/vegetable” in case of changes to local product availability.

- **Verifying Value Categories**

Some SFAs use third-party certifications to verify that vendors meet certain value categories, an approach that can effectively nudge large, traditional vendors to adopt more values-based practices. For small family farms and ranches, however, pursuing these certifications may not be an economically viable option. Similarly, the use of official M/WBE certifications by SFAs seeking to increase vendor diversity may pose issues for small producers due to cost, awareness, and/or resources. In light of these potential barriers, SFAs can consider offering vendors alternative methods—such as self-certifications—for demonstrating how their products and practices align with the program’s prioritized values. (See the **Vendor Questionnaire** and **Evaluation Criteria and Scoring** for specific examples.)

Leverage State and Local Policy

A common approach to incorporating values into a solicitation document—and to communicating those values to bidders—is to reference local policies that are in alignment with district or program goals.

SFAs can draw on a variety of policy types (e.g., local wellness policies, school procurement policies, a superintendent’s strategic plan, state farm to school policies) to outline and justify selected solicitation requirements—and policies that include

requirements related to school food procurement tend to be the most enforceable. By requiring annual reporting of local purchases, for instance, the D.C. Healthy Schools Act¹⁷ allows SFAs to adopt the same stipulation. One strategy for supporting and institutionalizing an SFA's commitment to values-based procurement, then, is to advocate for policies that contain specific requirements as opposed to those with recommendations.

This work can also extend to SFAs that contract with food service management companies. (See these examples from **Rhode Island** and **Virginia**, both of which have updated their FSMC RFP templates to include language that supports local sourcing and values-based procurement. Additional examples can be found in the **Solicitation Review**.)

Share Your Farm-to-School and Values-based Procurement Story

Promoting farm to school and values-based procurement successes, challenges, and opportunities is important for growing and sustaining program momentum. Promotion signals to vendors that an SFA is serious about values-based procurement (which may attract new bidders that



Seeing a recognizable farm name on a lunch line can create an immediate connection and excitement for students.

align with program goals) and raises student and family awareness surrounding innovative approaches to school meals, quality improvements, and a demonstrated commitment to core values. Moreover, sharing values-based procurement successes with superintendents, school boards, elected officials, and other oversight bodies can result in additional flexibility and funding—which, in turn, can lead to increased momentum and program expansion.

Some common promotion strategies include featuring farm names and identifying local items

¹⁷ For more information, visit: <https://osse.dc.gov/service/healthy-schools-act>

on menus, partnering with teachers to develop educational activities around local foods, and offering taste tests to introduce students to new foods. In SFAs where students come from families that are part of the local agricultural community, seeing a farm name they recognize featured on a menu or lunch line can create an immediate connection and excitement about where that food came from.

Beyond the cafeteria and classroom, SFAs can also attend school board meetings to update board members on farm to school efforts. Consider bringing samples of new menu items to these meetings: ensuring board members know what is happening in the school food program can empower them to promote it.

To reach parents and the broader community, SFAs often feature local items and the farm source on social media. Presenting a positive image online allows programs to build community awareness and support—and might even attract the local press.



REAL WORLD EXAMPLE

Share your farm to school and values-based procurement story externally to gain public support

Where: New York

Scenario: Broome-Tioga BOCES identified a need for greater internal distribution capacity to deliver products from farms who did not have the trucking capacity to reach all of the district's schools.

Solution: They shared their school's farm to school story publicly.

Outcome: Broome-Tioga BOCES was contacted by a local elected official who asked how they could support their farm to school program! The elected official was able to support the purchase of a new truck for the district, which allowed more local growers to participate and for an expansion of their farm to school program.

5 Practices for tracking and demonstrating the impact of values-based procurement

Determine what values to measure and how

It is up to each program to determine what to measure and how to measure it: what kind of tracking is feasible? What kind of data can best demonstrate impact? How might you use that data to share your farm to school story? Often, SFAs find that tracking local or specific-item (e.g., grass-fed beef) purchases is the easiest place to start; it may be more challenging to collect information about, say, a vendor's labor practices or animal welfare.

An SFA's data collection and reporting should align with any established local or other values-based procurement goals. For example, if an SFA commits to spending 15 percent of the food budget on unprocessed, locally grown products, they need to track purchases of these items (according to their local definition) and compare spending progress to the original percentage goal. Setting clear goals can also help justify the types of products or vendors an SFA chooses to target in an RFP.

To capture facts and figures efficiently, programs can require data to be reported (either by the distributor or, if an SFA is sourcing directly from a farm, by the farm vendor) in a specific format—a requirement that the SFA can outline in the RFP and use as part of their evaluation criteria. (See the **Vendor Questionnaire** and **Evaluation Criteria & Scoring** sections for specific examples.)

Measure meal participation

SFAs may find it valuable to track changes in student (or teacher!) meal participation when local items are featured and served. (According to interviewees, meal participation tends to jump most noticeably when local procurement is paired with scratch cooking.) An increase in meal participation, as multiple food service directors noted, often justifies the added costs (e.g., additional labor) associated with serving whole, local foods. Tracking meal participation can also set the stage for a positive feedback loop, as SFAs that report higher meal participation are in a better position to purchase higher-value products. This can strengthen an SFA's reputation in the broader community, too: many interviewees shared that parents, families, and teachers who observe improvements to food quality and appearance are more likely to approve of and support their programs.

Increase transparency

In order for SFAs to collect information and data that demonstrate impact, there needs to be greater transparency across the supply chain—and when an SFA includes transparency and reporting requirements in an RFP, they signal this demand to the market. Moreover, if enough SFAs do so, vendors may begin to respond with their own solutions.



COMMON METRICS TO TRACK OUTCOMES AND IMPACT

Qualitative

- Total volume in lbs.
- Dollar amount of local and values-based food purchases.
- Local spend as a percentage of a specific category or overall food purchases.
- Number of times local items appear on the menu.

Quantitative

- Anecdotal stories about student reactions to the new foods.
- Responses through student or parent surveys.
- Enthusiasm around ‘local days’
- What it means for local farms to partner with the school SFA

Finding Vendors

Example solicitations for values-based food procurement



EXAMPLE SOLICITATIONS FOR VALUES-BASED FOOD PROCUREMENT

As a reminder, there is no one-size-fits-all approach to values-based procurement. Certain factors can vary widely at the local level, so SFAs should always consider local context when writing a solicitation.

This section gives examples and guidance on how to solicit bids to meet your values-based food procurement goals.

The majority of solicitation examples included here are requests for proposals (RFPs). In contrast to an Invitation for Bid (IFB), RFPs allow SFAs to consider non-price factors when determining an award and therefore tend to offer the greatest flexibility when it comes to incorporating and targeting an SFA's core values in a competitive solicitation. This solicitation review outlines the main components of an RFP and offers a variety of approaches to incorporating program values using examples from solicitations for food service management companies, produce, and specific items (e.g., grass-fed beef).

Collectively, these examples serve to demonstrate how SFAs of different sizes, in different regions, and with different experiences target and support specific



What are schools looking for?

The most frequently referenced values in the solicitations reviewed include:

- *local sourcing*
- *environmental sustainability*
- *health, nutrition and safety*
- *equity and diversity*
- *educational opportunities*
- *community involvement*
- *support for small, medium, and family farms*
- *fair labor practices*
- *animal welfare*

values through an RFP's language and design. (Note: many of the featured examples are also applicable to IFBs, as their contract-language can be applied to an SFA's definition of "responsive and responsible bidder." The only section that is specific to RFPs is **Evaluation Criteria and Scoring.**)

Contents

Click to jump to solicitation examples relating to the following sections. The sections are organized alphabetically when the listed order is not important.



INTRODUCTION

- Purpose
- Values Statement
- Program Description
- Goals & Objectives
- Definitions
- Bidding & Award Method



VENDOR QUESTIONNAIRE

- Educational Opportunities
- Equity & Diversity Practices
- Labor Practices
- Local Sourcing & Reporting
- Mission and Philosophy
- Sustainable Growing Practices



PRODUCT SPECIFICATIONS

- Food Service Management Companies
- Local Beef & Local Beef Processing
- Produce
- Vended Meals



TECHNICAL REQUIREMENTS & PRODUCER STANDARDS

- Delivery & Logistics Requirements
- Educational Activities & Community Engagement
- Food Safety Requirements
- Local Sourcing Requirements
- Menu Requirements
- Ordering Requirements
- Traceability & Reporting Requirements



TERMS AND CONDITIONS

- Interlocal Agreements & “Piggybacking”
- Purchasing New Products
- Purchasing Off Contract
- Guidance for Food Service Management Companies



EVALUATION CRITERIA & SCORING

- Steps to Creating a Scoring Procedure
- Animal Welfare Criteria
- Data Tracking & Reporting Criteria
- Educational Opportunities & Community Engagement Criteria
- Environmental Sustainability Criteria
- Food Service Management Criteria
- Local Sourcing Criteria
- Social Responsibility Criteria

Crafting Bids
for Food Procurement

INTRODUCTION

Solicitation introductions or backgrounds are the first opportunity SFA programs have to communicate their values, preferences, and program goals to potential bidders. The examples below, organized by introduction subcategories, demonstrate how SFAs can use a solicitation's introduction to communicate core values.

Purpose

State your purpose clearly and include any relevant values or characteristics of the products or vendors the solicitation seeks to target.

Seven of the solicitations in the research sample specifically seek local produce to support farm to school programs:

The School Board of Alachua County (Florida) includes the SFA's definition of local:

“The District defines “local” as within 150 miles of Alachua County.

The introduction may also describe certain desired vendor characteristics in light of the solicitation's purpose. For example, the solicitation from **San**



INTRODUCTION EXAMPLES

- **Purpose**
- **Values Statement**
- **Program Description**
- **Goals & Objectives**
- **Definitions**
- **Bidding & Award Method**

Diego Unified School District Food & Nutrition Services (California) states how they expect prospective vendors to achieve key goals:

“Food and Nutrition Services is seeking to enhance the health of school meals by decreasing the distance food travels between farmers and students. Food and Nutrition Services strives to achieve this goal by working with vendors who can cultivate relationships with various types of local farmers that can provide local products to the District.





In addition to naming key characteristics of products or vendors, the introduction may also include a description of the types of preferred sourcing relationships and farm characteristics. The **Food Services Department for Ocean View School District** (California) provides this example:

“OVSD Food & Nutrition Services Department is seeking a Vendor partner who is willing and able to “think outside the (cardboard) box” and foster a mutually beneficial relationship based on trust,

transparency for the 2020/2021 school year. We expect to work with a produce vendor that works well with both production farms and boutique and/or “niche” farms. The District is particularly interested in partnering with small to medium sized farmers, beginning farmers, farms in which families own or control decision making on the farm, and farms owned or operated by minority and/or immigrant farmers.

Values Statement

A values statement is another opportunity to communicate key priorities and preferences. For example, in a solicitation for fresh produce, **D.C. Public Schools** (District of Columbia) identifies local sourcing, sustainability, and community engagement as core values:

“DCPS, FNS believes in providing appetizing school meals made from fresh, locally produced ingredients to the fullest extent possible in each kitchen, and we strive to engage the entire DC community in implementing programs that encourage healthy decision-making, promote sustainable practices and exceed expectations in satisfaction.

Another example comes from the **Austin Independent School District**, which participates in the **Good Food Purchasing Program** (GFPP), a values-based procurement framework. The statement reflects the five value categories central to GFPP:

“The District seeks to improve child nutrition by providing quality products, reduce the distance that food travels between producers and students, support labor law compliance along the supply chain, support food production practices that have lower environmental impacts, and support farmers and producers that provide healthy and humane conditions for animals.

Program Description

TIP | Values-based program descriptions can encourage bids from vendors who would not typically consider themselves eligible. It will also signal to traditional vendors the types of new farms and/or products SFAs would like made available.

The program description can demonstrate how a SFA's values are reflected in operations and implementation. It is also an opportunity to state how vendors are expected to contribute to overall program goals. Program descriptions can also provide a sense of contract size and scope by including relevant details, such as the size of the program (e.g., the number of students and sites served) and past metrics related to program goals (e.g., the percent of budget spent on local food or pounds of local food procured).

For example, **Buffalo Public Schools** (New York) describes the types of vendors they seek in order to support Food Service goals:



“The Buffalo Farm to School Team works to connect k-12 schools with local food providers to improve student nutrition, provide agriculture and nutrition education opportunities, and support local and regional farmers. Food Service is also striving to achieve this by working with vendors who can cultivate relationships with various types of local farmers who can provide local products to our district.

In stating the procurement priorities, **Ocean View School District** (California) includes the program's objectives and key values in selecting a vendor:

“The District's key objective is to get the best overall value for our students, considering quality, cost, service, diversity, community involvement, sustainability and other relevant values, for the products and services we intend to acquire.

This **Sample Local Foods RFP** developed by partners in Maine is especially applicable to programs that prioritize educational opportunities, community engagement, and the health benefits of farm to school:

“The school nutrition program works in concert with the teachers, SNAP Educators, and other community groups to educate students through school garden programs, classroom presentations, and field trips in order to increase the consumption of fruits and vegetables. School meals provide a great opportunity to develop healthy diet practices in order to reduce adverse health impacts later in life. By increasing the purchases of Maine fresh fruits, vegetables and other products, the nutrition program can also make a positive impact on the local economy and the Maine food system.



Similarly, the **Rhode Island FSMC RFP template**¹⁸ clearly states what is expected of the vendor to achieve the SFA's goals:



“To recap, the Rhode Island Program will contract with a Vendor to:

Purchase and serve locally grown, harvested, raised, and/or processed food products (fruits, vegetables, dairy, protein, etc.) whenever possible – actively pursue locally grown farm-fresh items and participate in the Farm to School Program;

Develop and maintain the cafeteria as a nutrition/wellness education-learning environment;

A common challenge in attracting vendors that can source local items is the mismatch between the school year and growing season throughout much of the United States. If your SFA offers a summer meals program, consider including this period within

the scope of the contract, as in this example from **Lawrence Public Schools** (Kansas):

“This solicitation is for all products vendors wish to sell to USD 497 for a one-year term, from August 1, 2018 – July 31, 2019, including information for products for the 2019 summer feeding program.

¹⁸ SFAs that choose to contract with a food service management company are often required to use standard solicitation templates provided by the state agency that administers USDA Child Nutrition Programs for the state. In this case, the FSMC RFP is provided by the Rhode Island Department of Education.

Goals & Objectives

As seen in the examples above, value statements and program descriptions may also include specific goals or objectives. If data is available, indicate the program's progress-to-date in meeting these goals, as well as how the SFA expects vendors to help achieve them.

For example, the **Sample Local Foods RFP**¹⁹ includes the following formula to determine a local spend goal in terms of percentage:

“\$ amount spent on local food / total \$ amount spent on all food purchases x 100 = % Local Food Spend Goal

Similarly, **Oakland Unified School District** (California) states a goal of procuring at least 50% produce locally.

Minneapolis Public Schools (Minnesota) includes a detailed set of goals in their RFP for fresh produce:

“The goals and values of the Farm to School program are as follows. These goals and values are reflected in the included Selection Criteria (Appendix 5). They may include, but are not limited to the following:

- *Establishing a Farm to School program that is cost effective for the District and mutually beneficial for both the District and the farmers*
- *Partnerships with vendors that are respectful and professional, based in open, honest, and timely communication*
- *Consistent, high-quality produce for students and staff*
- *Equity and diversity among suppliers and their employees*
- *Commitment to good stewardship of the land (sustainable or certified organic growing practices)*
- *Commitment to serving produce grown safely and without the use of chemicals that are harmful to child health*
- *Reliable, accurate, timely deliveries of products according to the agreed-upon product specifications and pack sizes*

To add context to program goals, SFAs may want to include the volume or quantity of local products procured in the previous year. The **Alachua County School Board** (Florida), for example, communicated a



¹⁹ This Local Foods RFP template is the product of the Auburn/Lewiston School Departments' Farm to School Implementation Grant 2018-2020 with additional funding support provided by the EB Sewall Foundation and a Maine Farm to Institution mini-grant. Partners on this project include The Maine Farm and Sea Cooperative, St. Mary's Nutrition Center (SMNC), MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.

variety of produce-procurement metrics, including total pounds, number of farms, and number of varieties:

“In the 2019-2020 school year, the District procured over 140,000 pounds of fresh produce from small to mid-sized farmers, grown using sustainable or certified organic growing practices within the State of Florida. A total of 13 farms and organizations currently provide nearly 40 varieties of fresh produce to the District. The District intends to increase the volume and variety of Farm to School produce for upcoming school years, and is excited to grow its commitment to fresh, sustainably grown produce for its students.

Solicitations for food service management companies can also include specific goals related to local sourcing and other values. **Chapel Hill-Cabarro City Schools (North Carolina) FSMC RFP** includes a comprehensive list of specific, measurable goals and vendor requirements:



“Local and Sustainably Produced Food

- A commitment to purchasing and promoting local foods.
- Quarterly local purchasing reports provided to the district stating quantity and dollar value of local purchases. A minimum of 10% combined spend on local fresh produce and protein with a goal of 30% within five years of contract start date. “Local” is defined as within 100 miles of Chapel Hill.

- Menus that reflect seasonal availability of local produce.
- Development of meaningful partnerships with local growers and producers.
- Partner chef and/or farmer engagement with each school.
- Preference, when feasible, towards products listed as organic or using organic practices.
- Documentation of percentage and expenditure on products produced in North Carolina.

Scratch Cooking Pilot

- FSMC agrees to participate with CHCCS and an organization such as Cycle 4 (NC) to pilot a scratch food kitchen. Details of the Cycle 4 (NC) project are available upon request.
- Commitment to increasing scratch made products throughout the district.

Progressive Food Initiative

FSMC agrees to a \$25,000 annual commitment set aside for progressive food initiatives that promote supporting the local food economy, reduction of processed foods, increasing fresh produce consumption, food justice and food equity initiatives. The fund will be administered in partnership with the FSMC and the district.

Definitions

Solicitations should include definitions for any key terms, especially those that relate to local sourcing and values-based procurement goals—not least because many vendors may be unfamiliar with certain concepts (e.g., geographic preference, farm to school programs).

A summary of key terms is provided below, organized by the following subcategories:

Defining Local for Geographic Preference
Farm to School & Harvest of the Month
Farm and Producer Types
Sustainable Food & Production Practices



Defining "Local" for Geographic Preference

Any solicitation applying a geographic preference should include the SFA's definition of local, which can vary by product, availability, geographic location, and/or season. Moreover, depending on the program's preferences and priorities, this can be a single definition or a tiered definition. If a specific distance is used as part of the definition of "local," be sure to indicate the location from which distance will be measured (e.g., central kitchen, district headquarters, etc.).

While geographic preference can be considered only for unprocessed agricultural products, SFAs can choose the local area to which the geographic preference will be applied.²⁰ See the **Additional Resources** section for a guide to applying geographic preference.

²⁰ USDA definition of unprocessed agricultural products available from <https://www.fns.usda.gov/cn/geographic-preference-procurement-unprocessed-agricultural-products#:~:text=In%20our%20view%2C%20for%20purposes,that%20retain%20their%20inherent%20character>

The following examples demonstrate different ways a SFA may choose to define “local”:

By Region:

Mundo Verde Charter Schools (Washington, D.C.) Fresh Produce RFP offers a regional definition that includes Delaware, the District of Columbia, Maryland, New Jersey, North Carolina, Pennsylvania, Virginia, and West Virginia.

By State and Region:

Rhode Island FSMC RFP template includes a local and regional definition. Local is defined as unprocessed agricultural products that have been grown/harvested/raised in RI and regional is defined as unprocessed agricultural products that have been grown/harvested/raised in CT, MA, VT, ME NY, NJ or NH.

By Distance:

Ocean View School District defines “local” as grown within 250 miles from the District Office.

By Distance & State (tiered):

Lawrence Public Schools defines local as:

- Tier 1: Within 75 miles of Lawrence High School
- Tier 2: Within the state of Kansas
- Tier 3: Within the region, defined as neighboring states Colorado, Missouri, Nebraska, and Oklahoma

By Product:

In the **Virginia State Department of Education’s FSMC RFP template**, milk is defined as local when its origin is from the region spanning Pennsylvania, Delaware, Maryland, and Virginia.

Farm to School & Harvest of the Month

This information may be referenced as part of the program description or included as a part of the defined terms. Providing clarity around these terms helps inform potential bidders about the programs they would be supporting if awarded a contract.

These examples, which come from **Ventura County Farm to School Collaborative** and **D.C. Public Schools**, provide comprehensive definitions of farm to school:

Ventura County Farm to School Collaborative Harvest of the Month RFP:

“*Farm to School - Farm to school enriches the connection communities have with fresh, healthy food and local food producers by changing food purchasing and education practices at school districts and early care and education settings. Students gain access to healthy, local foods as well as education opportunities such as school*

gardens, cooking lessons and farm field trips. Farm to school empowers children and their families to make informed food choices while strengthening the local economy and contributing to vibrant communities.

D.C. Public Schools FSMC RFP:

“Farm to School – Farm to school connects schools and local farms with the objectives of serving healthy meals in schools; improving student nutrition; providing agriculture, health, and nutrition education opportunities; and supporting local and regional farmers. Farm to school, at its core, is about establishing relationships between local foods and school children by way of including, but not limited, to:

- Locally grown, locally processed, and unprocessed foods in school meals – breakfast, lunch, after-school snacks – in classrooms, and as taste tests;
- Educational activities related to agriculture, food, health or nutrition such as nutrition education curricula, farm tours, farmer in the classroom sessions, culinary education, educational sessions for parents and community members, and visits to farmers’ markets; and
- School gardens as an opportunity for hands-on learning.

SFAs are increasingly implementing Harvest of the Month programs to highlight local and seasonal foods. See this example definition from **Ventura County Farm to School Collaborative** :

“Harvest of the Month - Is a Farm to School program that showcases and highlights unique locally grown foods to K-12 students via the classroom or cafeteria. Each month one specialty crop is featured in meals, lesson plans and other special activities across school campuses.



TIP | Many state education and agriculture agencies, as well the USDA Food and Nutrition Service Farm to School Program, offer additional resources to start or expand a Harvest of the Month program, including menu and recipe suggestions, lesson plans, marketing materials, and procurement support. Explore the **Additional Resources** for links to more information.

Farm and Producer Types

SFAs may seek to work directly with certain types of farms and businesses, or they may seek a vendor who holds those relationships as part of their supply chain. Providing clear definitions can help vendors identify farm partners who fit the SFA's goal-oriented criteria. Additionally, definitions of the farm ownership, size, or structure can be used as a specification or evaluation factor (see **Evaluation Criteria and Scoring**).

Ocean View School District provides the following definitions for farm ownership and size:

“Local farms (and businesses) must also be owned and/or operated by the farmer and not a publicly traded corporation.

***Family Farm** - a farm owned and operated by the farmer. A farm where decisions are made by the person or persons that own the land and that person also works on said land to grow food.*

***Small-Sized Farm** - is defined as a farm which grosses annually less than \$350,000 per year from all farm sales per year.*

***Mid-Sized Farm** - is defined as a farm which grosses annually between \$350,000 to \$999,999 from all farm sales per year.*

SFAs that seek to increase vendor diversity may want to award points to vendors who meet the definition of a socially disadvantaged farmer or rancher. **Buffalo Public Schools** includes this definition from USDA:

*“**Socially disadvantaged Farmer or Rancher:***

The Consolidated Farm and Rural Development Act defines a socially disadvantaged group as one whose members have been subject to racial, ethnic, or gender prejudice because of their identity as members of a group without regard to their individual qualities. USDA regulations further define socially disadvantaged farmers and ranchers (SDFRs) as belonging to the following groups: American Indians or Alaskan Natives, Asians, Blacks or African Americans, Native Hawaiians or other Pacific Islanders, Hispanics, and women.

Sustainable Food & Production Practices

Here's how a variety of SFAs defined their sustainable food and production practices:

D.C. Public Schools defines sustainable agriculture as:

*“**'Sustainable Agriculture'** means an integrated system of plant and animal production practices having a site-specific application that will, over*

the long-term satisfy human food and fiber needs, enhance environmental quality and the natural resource base upon which the agriculture economy depends, make the most efficient use of nonrenewable resources and on-farm resources and integrate, where appropriate, natural biological cycles and controls, sustain the economic viability of farm operations, and enhance the quality of life for farmers and society as a whole.

A FSMC RFP template from the D.C. Office of the State Superintendent of Education defines sustainable practices as:

“Sustainable practices: source from producers that employ sustainable production systems that reduce or eliminate synthetic pesticides and fertilizers; avoid the use of hormones, antibiotics, and genetic engineering; conserve soil and water; protect and enhance wildlife habitat and biodiversity; and reduce on-farm energy consumption and greenhouse gas emissions

D.C. Public Schools targets sustainable food options in their FSMC RFP:

“Plant-based food option” means food or beverages that are free of animal products; and with respect to the meat/meat alternate component of a meal, provide a source recognized



“Plant-based food option” means food or beverages that are free of animal products, like tofu.

by the USDA as a meat alternate free of animal products for the purposes of NSLP.

“Vegetarian food option” means food or beverages that are free of meat, poultry, and seafood; with respect to the meat/meat alternate component of a meal, provide a source recognized by the USDA as a meat alternate free of meat, poultry, and seafood for the purposes of the NSLP.

Bidding & Award Method

Using line-by-line bidding and offering multiple awards can increase competition—and when an SFA outlines these options early in a solicitation, they indicate interest in a wide range of vendors. The following examples showcase various ways to incorporate bidding and award methods into the solicitation:

Alachua County School Board RFP for Farm to School Produce:



“The District intends to select multiple farms or organizations to provide Farm to School fresh produce items. Our objectives are to identify vendor partners interested in collaborating with the District to grow its Farm to School program in a way that is mutually beneficial to the District and farmers and to gain a thorough understanding of the available supply of high-quality produce from qualified vendors, in order to procure Farm to School produce for upcoming school years.

Ventura County Farm to School Collaborative:



“Each district will choose who they intend to award this contract to based on whether the

Vendor meets the terms and conditions outlined in this Request for Proposals. Each school district reserves the right to award this contract either a) as a single lot award or b) line item by line item and will express the right to do so when advantageous to them.

Sample Local Foods RFP from partners in Maine²¹:

“This RFP is intended to be awarded to a single or to multiple vendors and to result in a firm fixed price contract. The District reserves the right to award in part to multiple vendors or as a whole to one vendor, whichever is deemed most advantageous to the District. Vendors do not have to provide pricing on every item to be considered.



Buffalo Public Schools:

“The district has chosen to implement a point system to determine which bidder most closely meets the best interests of the District. There is a possible score of 100 points. This is a line-by-line award: each line will be assessed individually and awarded to the bidder with the highest number of points.



²¹ This Local Foods RFP template is the product of the Auburn/Lewiston School Departments’ Farm to School Implementation Grant 2018-2020 with additional funding support provided by the EB Sewall Foundation and a Maine Farm to Institution mini-grant. Partners on this project include The Maine Farm and Sea Cooperative, St. Mary’s Nutrition Center (SMNC), MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.

TIP | Consider these additional practices for increasing potential bid participation for small and local vendors:

- Allow bids on partial quantities
- Allow bidders to turn down awards of specific items if awarded more items than can manage
- Request price lists from vendors who do not win the award. This is a good way to collect quotes for informal purchases. For example, see the **Sample Local Foods RFP** from partners in Maine²².
- Clearly indicate changes to the solicitation from the previous bid. This may alert bidders to new opportunities, such as changes to product specifications or menu requirements. For example, see the **School District of Philadelphia RFP** (Pennsylvania) for Pre-plated Meals.

²² Ibid.



PRODUCT SPECIFICATIONS & PRICING SHEETS

Including product specifications—variety, size, shape, quality, quantity, delivery frequency, seasonal availability—in the solicitation allows an SFA to target local and values-based products. Moreover, these specifications ensure the SFA receives the items best suited for their food service operation. A few examples of product specifications follow.

Best Practice

To guarantee that goal-specific specifications don't stifle competition, consider allowing bidders the opportunity to offer alternatives based on their capacity and availability. SFAs can allow bidders to provide any or all of the following information about local products:

- Available varieties
- Estimated quantities (all or part of what the district requires)
- Average weight/size
- Unit / pack size / case count
- Months when product is available
- Estimated delivery frequency in season (daily, weekly, monthly, quarterly)



PRODUCT SPECIFICATIONS & PRICING SHEET EXAMPLES

- Food Service Management Companies
- Local Beef & Local Beef Processing
- Produce
- Vended Meals

(Note: Product specifications are often included in a bid price sheet. A sample of 15 price sheets is available [here](#).)

- Estimated quantities per delivery
- Farm source

Offering vendors the opportunity to provide specifications in response to the questions above can help an SFA understand the full landscape of locally available products. As a result, the program may discover products that would not have been identified if farms or vendors were asked to respond to a set of predetermined specifications.

Note: this step can also be accomplished with a Request for Information (RFI), which allows an SFA to write any RFP product specifications with local farmer input in mind.

Food Service Management Companies

To assist local school districts that contract with a food service management company, the Office of the State Superintendent of Education (OSSE) in Washington, D.C. has developed language that allows programs to give preference to the FSMC that can meet certain optional food specification requirements.



D.C. Public Schools FSMC RFP:

“Meat / Meat Alternate:

- Preference may be given to FSMC offering organic and/or hormone and antibiotic free meats
- Preference may be given to FSMC who cook meat at FSMC or school facilities and do not serve pre-cooked, processed meat
- Preference may be given to FSMC serving beef no more than 2x/month
- Preference may be given to FSMC serving meat no more than 1x/week at breakfast

Dairy

- Preference may be given to FSMC who offer organic and/or hormone and antibiotic free milk

Other

Each SFA may give preference to FSMC who can provide locally grown unprocessed foods (from Delaware, D.C., Maryland, New Jersey, North Carolina, Pennsylvania, Virginia, or West Virginia). FSMC should certify below the percentage of locally grown or raised foods to be utilized in meals.

- Percentage of locally grown or raised foods to be utilized in meals: _____

Similarly, the **NJ State FSMC RFP template** provides optional language to support the application of geographic preference by the FSMC:

“All products provided pursuant to this geographic preference shall be labeled with their place of origin, including grower name and address/state or area of production on each case and/or invoice delivered.

Locally and/or regionally grown products should be generally free from insect damage and decay. Flexibility on grading for produce shall comply with USDA guidance. Produce items are to be rinsed, cleaned, and packed in appropriate commercial produce packaging such as waxed cardboard boxes or sanitary/reusable bins.





Local Beef

For SFAs interested in sourcing local beef, see the **Montana Beef to School RFP Template:**

“Required:

- *Processed in a USDA [or state inspected facility]. [Note: state inspection is only applicable in the 27 states that operate a Meat and Poultry Inspection (MPI) Program. Click [here](#) to see if your state operates an MPI program.]*
- *A seal and/or proof of inspection must be provided.*
- *Packaging should be clean with no signs of damage or adulteration.*

Optional:

- *Any packaging requirements or flexibility with packaging material or sizing*
- *Quality/Grade such as “Grade A”*
- *The school will accept culled dairy cows or just beef cattle*
- *The school’s policy about hormones/sub-therapeutic antibiotics*
- *The school accepts beef from cattle that has been fed grains, grass, or mixed feed*
- *Must be able to trace each case back to ranch of origin*
- *Minimum shelf life upon delivery of X days (e.g., 3 days) for fresh product or X months (e.g., 3 months) for frozen product.*

Local Beef Processing

One way to ensure products meet an SFA’s local requirement for processed items is to include it in the processing specification.

Buffalo Public Schools RFP for NY Beef Processing:

“All products must contain a minimum of 51% NY beef per serving, which will be supplied by the

district. The source of origin for all remaining ingredients are at your discretion, assuming nutritionals are maintained. The bid price should reflect the cost of the additional 49% of ingredients, freight to 1055 E. Delavan, Buffalo NY 14215, and the cost of processing.



Produce

Sample Local Foods RFP developed by partners in Maine:²³

“Varieties: Seeking as many as possible over the course of the season;

Sizes: 125 to 140 count depending upon school location;

Quality: Products are Free from decay, bruises, brown surface discoloration, sunburn, insects, and disease. All boxes will be inspected for bruising and will be rejected if more than 2% are showing damage. (3 out of 140; 2 out of 125)

Packaging: Apples are packed in 40 pound cases in either tray packs (size 100-150) or cell packs (size 96-140) or in bulk boxes.

Traceability: Each case of product delivered must be labeled with farm name, product, date harvested, and date packed

Vendors will provide produce without stickers on individual pieces

Keep in mind these other specifications often used to target local produce:

“Quality:

- Produce free from insects, damage, and decay
- Vendor can provide state of origin
- Product is refrigerated after harvest
- Product is of high quality and free from spoilage

Farm Practices

- Product is sourced from a farm or facility that complies with food safety standards
- Product is packaged as specified
- The farm name is labeled on product or is otherwise specified
- Delivery
- Vendor can deliver directly to multiple school sites as specified
- Vendor can deliver directly to centralized location as specified
- Products are rinsed, cleaned, and packed in appropriate packaging

²³ This Local Foods RFP template is the product of the Auburn/Lewiston School Departments' Farm to School Implementation Grant 2018-2020 with additional funding support provided by the EB Sewall Foundation and a Maine Farm to Institution mini-grant. Partners on this project include The Maine Farm and Sea Cooperative, St. Mary's Nutrition Center (SMNC), MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.

Vended Meals

SFAs that seek vended meals may also include specifications to target locally-sourced items and support procurement goals like cultural diversity, product variety, and protein quality.

The School District of Philadelphia:

“Geographic Preference:

The District prefers to receive fruit and vegetables grown in Pennsylvania, New York, New Jersey and Delaware. When those items are procured, the vendor will provide the District with locally grown product information and those items will be menued as such.

Cultural Diversity:

The menu must offer a wide selection of culturally diverse and healthy options and reflect the cultural diversity of the School District of Philadelphia and may be developed and introduced over the course of the contract. To that end, menu items should include Latin, Caribbean, Middle Eastern and Asian-inspired menu items as well as menu items reflecting regional variations in the United States. Cultural Diversity menu items must be menued at least 6 times per cycle. Vendor will submit potential cultural diversity menu items to the District for approval.

Product and Seasonal Variety:

Red Delicious apples should not be served more than twice per cycle. Other apple varieties should be served first.

The district expects seasonal offerings of a wider variety of fruit throughout the year- including but not limited to different varieties of apples (such as gala, imperial, fuji), grapes, nectarines, watermelon, strawberries, cantaloupe, peaches and kiwi.

Ground Beef and Hamburger Patty:

Preference for hormone- and antibiotic free or grass-fed or grass-finished.

Poultry:

Preference for hormone- and antibiotic free

Fruit:

Preference given for fruit grown in PA, NJ, NY, or DE.

Apples: *Firm, crisp, and well colored of the following varieties: Macintosh, Winesap, Gala, Honeycrisp, Cortland, Fuji, Empire, Braeburn as available. Red Delicious only allowed once per cycle.*

TECHNICAL REQUIREMENTS & PRODUCER STANDARDS

To be considered a responsive and responsible bidder, vendors must demonstrate their ability to meet any technical requirements outlined in the solicitation. SFAs should always consider what documentation bidders will submit as evidence that they meet the requirements of the solicitation.

The examples below, which feature requirements in alignment with values-based procurement goals, are organized by subcategories that SFAs can include alongside standard requirements.



TECHNICAL REQUIREMENT & PRODUCER STANDARD EXAMPLES

- Delivery & Logistics Requirements
- Educational Activities
& Community Engagement
- Food Safety Requirements
- Local Sourcing Requirements
- Menu Requirements
- Ordering Requirements
- Traceability & Reporting Requirements

Delivery & Logistics Requirements

It can be difficult—or impossible!—for a small farm to make direct deliveries to all district school sites. As a result, SFAs can make the bidding process more accessible by adjusting the standard delivery requirements.

TO CONSIDER

- Minimize the number or required delivery locations
- Add flexibility around delivery days, windows and frequency
- Loosen vehicle and packing-container requirements

(See the **Broome-Tioga (New York) BOCES Fresh Fruit, Vegetables, and Meat RFP** and the **Lawrence Public Schools Farm to School Fresh Produce RFP** for good examples of this kind of flexibility).

The **Minneapolis Public Schools Fresh Produce RFP** states that it will make efforts to minimize the number of deliveries required of farms, and maximize the volume of products to help reduce delivery costs. Their RFP also includes a variety of packing and delivery options that meet district requirements:

“Awarded farmers must deliver products in clean, new boxes/bags or other mutually agreed-upon containers using clean, sanitary delivery vehicles. Bulk boxes or re-usable bins may be negotiated on a case by case basis. While refrigerated trucks are not required, product temperatures will be checked upon delivery for appropriate ranges for food safety.”

Lawrence Public Schools Farm to School Fresh Produce RFP assists farmers who may lack the required supplies by offering the use of reusable bins:

“To assist farmers selling to USD 497, the district may provide washable yellow bins for use throughout the season, if requested by the farmer. The yellow bins will be washed and sanitized by USD 497 employees. Upon completion of the growing season and that year’s farmer distribution agreement, USD 497 will withhold final payment until all bins are retrieved.”

Educational Activities & Community Engagement

While it's not a required component of the solicitation, many programs seek vendors who can offer educational activities and engage the school community. The examples below demonstrate how an SFA can incorporate these activities in their RFP, as well as the value these activities can bring to students.



Ocean View School District encourages the awarded vendor for Harvest of the Month to develop student connections:

“The District believes it’s important for students to know where their food comes from. The District values direct connections between farmers and our students. The winning Vendor is encouraged (but not required) to help this district connect to farmers providing HOTM product so educational programming can be developed such as farmers visits to schools, farm trips, pen pals, u-picks, staff and student CSA drop offs or some other activity. The District understands the busy nature of farm life, so educational opportunities may be tailored to the interest level and capacity of each farmer.

Lawrence Public Schools Farm to School Fresh Produce RFP requests marketing materials for farm to school promotion and includes how they hope farms will engage with students:

“Farm to School for USD 497 means linking classroom, garden, and lunchroom to foster a comprehensive and enriching experience for our students that supports health and learning. We welcome the opportunity to work with the farmers we buy from to enhance the food, farming, and nutritional education of our students.

As part of the district’s various media and educational communications about Farm to School, USD 497 reserves the right to feature the farmers it purchases local foods, and hopes for farmer participation in media engagement from time to time. For example, the District may include the name and a logo or photo on the serving line for students to see or mention farmers in a press release—including outputs from partnering organizations like LiveWell Lawrence.

To these ends, USD 497 requests the following:

- *A high-quality digital copy of a farm’s logo (if applicable)*
- *Photos of the farms and farmers selected, including some close-ups that show the farmers’ faces*

Finally, we hope to engage with our farmers in more ways than just purchasing products.

This could include field trips to visit your farm, in-school visits, creation of lessons or cafeteria posters/signs, etc. The Response Form offers farmers the chance to indicate if he or she would like to fulfill one of these supplemental roles. You can learn more about Farm to School educational programming at USD 497 here: www.usd497.org/farm2school



D.C. Public Schools outlines how they expect FSMCs to provide both educational opportunities and programmatic supports:

“The FSMC will participate in SFA farm to school events by sourcing local produce for Strawberries and Salad Greens Day and Growing Healthy Schools Month.

The FSMC will provide SFA with materials (menus, posters, displays, etc.) providing information about the farm/farmers/school garden from which food was sourced.

The FSMC will provide SFA with information highlighting nutrition, agriculture, and food system careers to showcase career opportunities within food-related fields.

As feasible, [SFA Name] hopes to coordinate staff and student visits to farms. Educational opportunities may be tailored to the interest level and capacity of each farmer.



While it's not a required component of the solicitation, many programs seek vendors who can offer educational activities, including field trips to the farm, as seen here.

The FSMC will visit SFA cafeterias, classrooms, and/or the school garden at least once annually to promote the importance of farming and agriculture with students.

The FSMC will provide garden maintenance such as watering, weeding, and harvesting.

In order to expose students to growing and harvesting practices and the health benefits of eating fruits and vegetables, the **School District of Philadelphia** specifically requests farmer profiles, distributed by the vendor, be displayed online and on flyers and/or posters in schools.



Food Safety Requirements

The USDA offers two voluntary audits, Good Agricultural Practices (GAP) and Good Handling Practices (GHP), for verifying that fruits and vegetables are produced, packed, handled, and stored to minimize risks of microbial food safety hazards. Because GAP and GHP can be cost-prohibitive to small farms, SFAs have the option to request a Food Safety Plan instead.

To verify a vendor's food safety practices, SFAs can require vendors complete (or provide an equivalent to) a **Farm to School Food Safety Checklist**, which may be provided by the state's farm to school program. SFAs with adequate capacity can also request a site visit or ask a program partner, such as an extension office, to conduct the visit on their behalf.

Minneapolis Public Schools Farm to School Fresh Produce RFP provides a comprehensive approach to food safety, which includes a Food Safety Plan and a Food Safety Workshop (or a Food Safety Phone Review Session) for local farm vendors. They also note that University of Minnesota (UMN) Extension On-Farm Good Agricultural Practices partners will be available to local farm vendors to provide ongoing food safety technical assistance and respond to food safety questions.



Because GAP and GHP can be cost-prohibitive to small farms, SFAs have the option to request a Food Safety Plan instead.

The **Durango School District (Colorado) Locally Grown Fruits & Vegetables IFB** provides a streamlined approach to food-safety requirements:

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

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





Local Sourcing Requirements

Programs can establish local sourcing expectations by stating the total volume, price, percentage, or frequency of local products they prefer. SFAs may evaluate bids based on a vendor's ability to meet these expectations (volume and/or frequency expectations can also serve as volume benchmarks to assess vendor performance and ensure accountability).

While the first set of examples come from SFAs that contract with a food service management company, some may be applicable to SFAs contracting with larger distributors.

The **Port Angeles School District FSMC RFP** (Washington) outlined a local spend requirement for the FSMC:

The FSMC shall allow 25 percent of food budget for local farm to school purchases.

In North Carolina, **Chapel-Hill Carrboro City Schools** provides language to communicate expectations for local sourcing, the application of geographic preference, and the expectation that fair prices will be paid to farmers:

“SFA shall instruct FSMC of the geographic preference option to be used throughout the duration of the Contract. The availability of North Carolina products is expected by SFA. The Farm-to-School relationship should be enhanced, encouraged, and supported by any vendor supplying goods to SFA. Therefore, SFA shall give preference to items that can be delivered within 24 hours of harvest or production.

FSMC shall make a good faith effort to purchase local products first when available. In keeping with SFA's mission of establishing local agricultural partnerships, SFA advocates that a fair price be paid to farmers to help make this important segment of the local economy sustainable.

Chapel-Hill Carrboro City Schools also includes a detailed list of “Local and Sustainably Produced Food” requirements for the awarded vendor:

- *A commitment to purchasing and promoting local foods.*
- *Quarterly local purchasing reports provided to the district stating quantity and dollar value of*





local purchases. A minimum of 10% combined spend on local fresh produce and protein with a goal of 30% within five years of contract start date. “Local” is defined as within 100 miles of Chapel Hill.

- *Menus that reflect seasonal availability of local produce.*
- *Development of meaningful partnerships with local growers and producers.*
- *Partner chef and/or farmer engagement with each school.*
- *Preference, when feasible, towards products listed as organic or using organic practices.*
- *Documentation of percentage and expenditure on products produced in North Carolina.*

SFAs may also ask bidders to indicate the percentage of locally grown or raised products to be used in school meals or set a minimum requirement for the awarded vendor. For example, **Norwalk Public Schools** (Connecticut) includes a 35-percent minimum requirement for local procurement from the tri-state area and instructs the awarded vendor to engage directly in farm to school initiatives:

“Locally grown produce, including produce grown in NPS School Gardens, must be used throughout the district as an integral part of all menus.

Work with stakeholders to engage in USDA’s Farm to School initiatives to connect schools with CT local farms in order to serve healthy meals using locally produced foods.

SFAs may find it difficult to find a food service management company that is able to meet the district’s local procurement expectations. In this case, one option is for the SFA to purchase local items directly and require their use by the FSMC, as laid out in this example from the **Arkansas State FSMC RFP template**:

“The FSMC, as the agent of the SFA, will promote, encourage and increase participation in the Arkansas Grown Program using Arkansas grown/ locally grown products to the maximum extent practicable, including but not limited to, fruits, vegetables, protein and dairy products, whenever possible, and when purchased by the SFA directly, such fruits, vegetables, protein and dairy products must be used by the FSMC in the SFA’s Food Service Program. Arkansas Code §15-4-3802 as amended by ACT 796 of 2019.

Menu Requirements

The following menu requirement examples come from SFAs that contract with a food service management company or vended meal service providers. Requirements in this case may include vendor participation in menu planning to meet local product needs, a minimum frequency of serving items that are locally sourced, and outreach and communication when serving local products.

For example, **D.C. Public Schools** requires the bidder provide a contact person responsible for identifying local products to be placed on the menu, specifies the type of local items to be served, and outlines the required frequency:



“The FSMC agrees to serve locally-grown or raised unprocessed foods from growers engaged in sustainable agriculture practices whenever possible, and at minimum once daily.”

Following the **School District of Philadelphia**, SFAs that operate a Harvest of the Month program may require vendors indicate their ability to participate in the program:

“Vendors responding to this RFP must indicate their ability to participate in featuring regionally sourced produce such as apples, pears, sweet potatoes, mushrooms, salad greens, baby spinach,

and squash on the menu monthly. Regionally sourced produce is expected during the summer months as well as during the school year.”

The School District of Philadelphia also specifies how often the HOM item is featured and in what meals:

“Each produce item is featured at least one time at lunch and may also be featured at Breakfast during the selected month and can be served in a special recipe, such as Apple Chicken Salad to create excitement around the featured produce. District will work with Vendor to identify how the featured item will be menued.”

Broadline Distributor Examples:

Oakland (California) Unified School District’s Farm Direct Pilot Program requires vendor distributors to receive and ship products from farms selected by the district:

“Ability to provide locally-grown produce. For the purpose of this quote, locally-grown is defined as within a 250 mile radius from Oakland, CA. Oakland Unified prefers locally-grown products whenever possible and has a goal of procuring at least 50% of produce locally.”





Ability to partner with OUSD to implement a farm-direct purchase pilot program, whereby OUSD will procure some local produce items directly from local growers (see schedule C) and the vendor shall:

- *Receive and ship whole locally-grown produce purchased by Oakland Unified during specified seasons.*
- *Receive, process and ship locally-grown produce purchased by Oakland Unified during specified seasons. Bidder may subcontract processing of locally grown produce.*

San Diego (California) Unified School District:

“Local Farms: *Farms which grow or raise food within the area defined by the District to be San Diego Local, Regional, and California Grown and adhere to the standards outlined below:*

Local farms are to be no larger than 500 acres.

- *Preference given to farms that are 300 acres or less.*
- *Exceptions may be made for farms that qualify as California Grown in this category*
- *Local farms shall grow no less than five crops per 500 acres.*
- *Preference will be given to San Diego Local and Regional farms that grow no less than 5 crops per 300 acres.*

Local farms shall grow food with no detectable pesticide residues on/in final food products.

- *When possible, local farms are to use Integrated Pest Management (IPM) techniques. No IPM certification is required.*

Local Farms shall utilize 50% or greater of their human labor power when growing, harvesting, packing, and selling their food.

- *Exceptions may be made for farms that qualify as California Grown in this category.*

Local farms shall be able to deliver product to the District’s contracted produce vendor within 72 hours of harvest.

Local farms shall not pre-treat, wash or clean raw or lightly processed foods with toxic detergents or cleansing agents such as bleach, ammonium or others not listed here.

Local farms must be willing and capable of working with or delivering directly to the District’s contracted produce vendor.

Local farms must be willing to meet basic variety, grading, and packing standards of the contracted produce vendor.

Local farms shall be able to provide experiential educational opportunities for District students such as farm tours.



Ordering & Vendor Communication Requirements

Communication is Key!

Because local farms and smaller vendors may be new to contracting with school food service, be sure to outline any ordering or communication expectations. The following requirements are especially important:

- A primary and secondary contact for field product availability inquiries by phone and email
- When and how the SFA expects to receive updated product availability lists
- Expectations for how and when orders will be placed, as well as anticipated quantities
- The process or expectations for communication when there are changes to product availability or the need for substitutions
- When and how the SFA expects to receive updated product availability and price lists



Outline ordering or communication expectations in your contract language, especially for local farms and smaller vendors who may be new to contracting with school food service.

See **Minneapolis Public Schools, Lawrence Public Schools, Montana Beef to School RFP Template** and the **San Diego Unified School District Fresh Produce RFP** for specific examples.



Traceability & Reporting Requirements

This section provides example requirements to help programs identify and track farm sources and other value-added product characteristics.

Traceability

Minneapolis Public Schools focuses on product label requirements:

“Each case of product delivered must be labeled with farm name, product, date harvested, and date packed. The District reserves the right to request documentation that verifies the traceability information provided on each case, and the farmer must provide documentation within 24 hours of the request.”



Ocean View School District (OVSD) requires weekly offering lists and invoices include the following product-origin information:

- Mandatory identification of Country of Origin;
- Mandatory identification of California products;
- Mandatory identification of state of origin of other products;
- Prefer the identification of Farm/Farmer and farm location

OVSD also seeks vendors that have demonstrated experience purchasing and promoting California agricultural products. As part of their RFP responses, vendors are required to provide letters of support from California small and mid-size farms, create unique product codes for CA-grown products, and describe their traceability systems.

Reporting

SFAs may request reports from vendors to demonstrate the impact of the district’s purchasing. Reports may be requested monthly, quarterly, annually, and/or upon request and can include product type, farm name, state, region, total volume, total dollar amount, and/or local spend as percentage of total purchases. Be sure to communicate the required format (e.g., Excel) for data analysis and reporting purposes.

For example, **D.C. Public Schools** requires a quarterly summary report that includes the FSMC’s farm source, as well as the amount and type of products that FSMC purchased. The **School District of Philadelphia** requires the vendor to report total volume and dollar amount of regional produce on a monthly and yearly basis and include farm, state, and region. Similarly, **Ocean View School District**

As part of their RFP responses, vendors are required to provide letters of support from California small and mid-size farms, create unique product codes for CA-grown products, and describe their traceability systems.



requires digital monthly and year-end velocity reports in Excel format (not PDFs or scans):



“Detailed reports by site and consolidated reports by district are required. District staff are willing to work with farmers to develop an adequate system if that help is required. Reports must contain the following:

- *Item name*
- *Brand Name (or Farm name)*
- *Pack size*
- *Farm location*
- *Quantity purchased*
- *Item price*

D.C. Public Schools adds additional requirements to their velocity reporting, including the name and location of each supplier throughout the supply chain (all distributors, wholesalers, processors, manufacturers, shippers and farm(s) of origin), the source farm or ranch, and total dollar value spent at said farm or ranch. Bidders are required to submit a sample report with their proposal, provide reports through a customer-facing, electronic ordering and reporting system; and offer instructions for retrieving reported data.

SFAs new to requesting local and values-based purchasing data may want to start small. The **Rhode Island Food Service Management Company RFP**, for instance, requires a single metric to be reported

monthly: the total amount of locally grown, harvested, raised, and/or processed food items used in the production of school meals as percentage of total dollars spent by purchase category (e.g., produce, dairy, etc.). The **School District of Philadelphia RFP for Pre-Plated Meals** includes a similar requirement but adds details about farm name, state, and region.

For SFAs that contract with a food service management company and are looking for more detailed reporting, the **Virginia Department of Education’s FSMC RFP** template provides the following example:

“[SFA name] is interested in the traceability of all products served to [SFA name] students, particularly that of locally/regionally grown products. If FSMC is not able to detail the item source by site in monthly velocity reports, they may submit a separate traceability report by product in excel format. This separate traceability report must include all the information required for the velocity report and the item’s source.

If locally/regionally grown: farm of origin for each item, particularly for, but not limited to locally/regionally grown produce. If product was not purchased directly from a farm, please provide as much information as available regarding the source of produce.

If non local/regionally grown: state of origin.



Other Requirements

Liability Insurance

While it is recommended that SFAs require vendors to carry general or product liability insurance, these policies can be costly, and the minimum amount of required insurance coverage can potentially exclude smaller vendors. The most common minimum requirement is \$1,000,000 in product or general liability insurance. (Of the solicitations reviewed for this report, **Lawrence Public Schools** requires the lowest minimum product liability insurance requirement [\$500,000 for produce vendors].) Minimum insurance requirements will vary by program; SFAs should check in with their business office.

Experience

When applicable to their programming, SFAs can require a certain type or level of experience of its vendors. For example, the **Rhode Island FSMC RFP** seeks a vendor with the following farm to school experience:

- *Purchasing of local foods*
- *Fresh foods scratch cooking*
- *Sustainability*
- *Student, Family, Staff and Community Engagement*



The **Montana Beef to School RFP template** includes a section for additional vendor requirements, which can include a track record of good customer service or strong relationships with local suppliers.

Special Projects

SFAs may wish to include additional vendor requirements related to new or special projects. For example, this **FSMC RFP from Chapel Hill-Carrboro City Schools** includes requirements related to a new scratch cooking pilot and funding for a progressive food initiative:



“Scratch Cooking Pilot

- FSMC agrees to participate with CHCCS and an organization such as Cycle 4 (NC) to pilot a scratch food kitchen. Details of the Cycle 4 (NC) project are available upon request.
- Commitment to increasing scratch made products throughout the district.

Progressive Food Initiative

- FSMC agrees to a \$25,000 annual commitment set aside for progressive food initiatives that promote supporting the local food economy, reduction of processed foods, increasing fresh produce consumption, food justice and food equity initiatives. The fund will be administered in partnership with the FSMC and the district.

TIP | Avoid unnecessary requirements that can increase the product price and/or decrease the number of local growers who meet the conditions.



VENDOR QUESTIONNAIRE

The vendor questionnaire is an opportunity for programs to determine how well a vendor aligns with their values, whether or not a vendor meets certain bid requirements, and how a vendor plans to help the SFA achieve its local sourcing and values-based procurement goals. SFAs can score responses to specific questions as part of the overall bid evaluation. *(Note: when looking over the example prompts, keep in mind it may be difficult for small farms to complete lengthy questionnaires).*

This section is divided into subcategories deemed most relevant to local sourcing and values-based procurement.

Educational Opportunities

Educational opportunities for students can strengthen a district's farm to school program. SFAs may use the following questions, borrowed from the **Ocean View School District** and the **Sample**

VENDOR QUESTIONNAIRE EXAMPLES

- Educational Opportunities
- Equity & Diversity Practices
- Labor Practices
- Local Sourcing & Reporting
- Mission and Philosophy
- Sustainable Growing Practices

Local Foods RFP,²⁴ to determine a vendor's interest and capacity to provide educational opportunities, keeping in mind farmer schedules and their capacity to offer additional resources:

“Are you Interested in educational opportunities with students? Y/N

What types of educational opportunities are you able to provide? Check all that apply:

²⁴ This Local Foods RFP template is the product of the Auburn/Lewiston School Departments' Farm to School Implementation Grant 2018-2020 with additional funding support provided by the EB Sewall Foundation and a Maine Farm to Institution mini-grant. Partners on this project include The Maine Farm and Sea Cooperative, St. Mary's Nutrition Center (SMNC), MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.



- Farm pen pals with a classroom
- Visits to classrooms/cafeterias by farmers
(Usually in [X month] during [State] harvest lunch week or Farm to School month in October)
- Farm tours or field trips for students and/or kitchen staff and teachers
 - Are you insured to host tours - Y/N
- Special educational events
- Facility tours (for produce farms)
- Student interns or other youth employment opportunities
- Act as an advisor in a school garden
- Other: _____

Equity & Diversity Practices

Increasingly, SFAs want to do business with farms and vendors that incorporate values of equity and diversity. SFAs may include a general, open-ended question like this one to learn about the bidder’s commitment to and practice of equity and diversity:

“How does your farm/organization support or demonstrate Supplier Diversity and Employee Diversity?”

Third-party certification programs exist to help SFAs

identify women and minority-owned businesses—but relying solely on M/WBE certifications to diversify contracting opportunities can be limiting. Nonprofits, for instance, cannot quality and certifications can be cost prohibitive. As an alternative method for assessing organizational leadership and expanding contracting opportunities for underrepresented groups, consider including these questions from The Common Market Farm Impact Assessment and **Buffalo Public Schools** in your questionnaire:

“Is this a majority woman-owned business AND/OR majority minority-owned business?”

- My company has minority leadership. Please enter the % of minority leaders.
- My company has female leadership. Please enter the % of women leaders.

Are you a Socially Disadvantaged Farmer?

The Consolidated Farm and Rural Development Act defines a socially disadvantaged group as one whose members have been subject to racial, ethnic, or gender prejudice because of their identity as members of a group without regard to their individual qualities. USDA regulations further define socially disadvantaged farmers and ranchers as belonging to the following groups: American Indians or Alaskan Natives, Asians, Blacks or African Americans, Native Hawaiians or other Pacific Islanders, Hispanics, and women.



REAL WORLD EXAMPLE

Thoughtful use of language allowed this school district to prioritize socially disadvantaged farmers in its bid process

Where: Buffalo Public Schools, Buffalo, NY

Scenario: **Buffalo Public Schools** solicited proposals to provide fresh produce for their Child Nutrition programs for the 2020-21 school year. Vendors were evaluated using an evolved point system, one that considered values that mattered most to the community. One such value was centered on increasing opportunities for diverse vendors.

Challenge: The district struggled to identify fitting language for their solicitation that would be sufficiently inclusive. The district's procurement department originally suggested the use of "Minority & Woman-owned Business Certifications (MWBE)" within its language as a means to attract and create opportunities for vendors representing these historically marginalized groups that hold the certification. Food service, though, noted that the certification was not widely held among regional farmers, and therefore excluded groups from participation.

Solution: The district agreed to adopt the USDA's definition for socially disadvantaged farmers and ranchers (SDFRs) in its bid language for the first time as a way to cast a wider net for potential participation. The USDA defines these groups as producers that have been subject to racial or ethnic prejudice. SDFRs include farmers who self-identify as Black or African American, American Indian or Alaska Native, Hispanic or Latino, Asian or Pacific Islander, and/or women. Vendors were given the opportunity to self-certify as socially disadvantaged through the bidding process.



Takeaway: When incorporating values-based language into solicitations it is important to review if it achieved the intended outcomes and make adjustments accordingly. In this example, a third-party certification approach excluded the very vendors the district was seeking to support.

Labor Practices

The Good Food Purchasing Program includes “Valued Workforce” as one of the five value categories. These questions can help SFAs determine whether vendors meet the criteria of a valued workforce, which includes fair labor practices:

“Is this business a farmer or employee-owned cooperative? Y/N

Is this business or any part of its workforce unionized? Y/N

Do you pay your staff a living wage (minimum wage) or have a living wage policy in place?

Do you, your farm partners, or products you carry hold any third party certification related to labor?

- Fairtrade
- Fair Food Program
- Equitable Food Initiative
- Food Justice Certified by the Agricultural Justice Project
- Farms unionized through FLOC (AFL-CIO), FUJ, PCUN, or UFW

Local Sourcing & Reporting

Programs may wish to source from farms of a specific type, size, or location. The examples below cover a range of questions to determine how well the bidder is able to provide products that meet the SFA’s preferences for local sourcing. Additionally, SFAs will want to determine how the vendor will verify the source of local products and if the vendor can meet the program’s reporting requirements.

For vendors that represent an individual farm, include a simple “Yes or No” question to determine whether the farm meets the SFA’s definition of local:

“Located within [X county]: Y/N

Located within [X miles] from the district address: Y/N

The following examples apply specifically to vendors that work with multiple farms, offering additional ways to their ability to provide the SFA with locally-sourced products:

“Please describe your organization’s ability to provide districts with locally grown, source identified produce.

How many local farms do you work with?

Please describe your relationship with farms under [x] acres (direct, via pack-houses, or grower-shipper operations).



Please provide a list of local farms including name, address, and size that you currently work with or plan to work with for the 20XX/20XX year.

What percentage of products sourced within [X miles of district address/city] or [county/state] are you able to provide? Mark one:

- 50% or more
- 30-49%
- 20-29%
- 0-19%

How many local family farms do you buy from that are between: (Place an X by the best answer)

- 1 to 50 miles from the district _____
- 50 to 100 miles from the district _____
- 100 to 150 miles from the district _____
- 150 to 200 miles from the district _____
- 200 to 250 miles from the district _____

SFAs seeking processed local products may also wish to include the following questions:

“What is your ability to provide individually wrapped pre-cut organic or fresh cut local produce?”

Is your facility licensed for light processing?

Please describe your strategy for processing local products (including receiving, storage, processing, and delivery) and maintaining source-identification.

TIP | *When constructing a vendor questionnaire, keep your question type in mind. While open-ended questions allow for a greater range of responses, close-ended questions are easier to evaluate and score. Be sure to consider your program’s capacity to evaluate responses and vendors’ capacity to provide source-identification in a particular reporting format.*

These open-ended questions can determine a vendor’s ability to provide source identification:

“Please describe your system for tracking and labeling locally grown products.

How will you communicate product origin to the district?

How will the district access reports?

Additionally, SFAs can use close-ended questions to determine a vendor’s reporting capabilities. SFAs can customize the following example questions, which come from the Community Alliance with Family Farmers (CAFF) Bid Generator template, to meet their reporting specifications.

“Can you currently produce reports to show the percent of local (within X miles of INSERT CITY, STATE) products provided, including farm name and origin?”

- Yes, including percent, farm name, and origin
If yes, please describe current reporting/
tracking mechanisms below.
- Yes, including percent, but not farm name or
origin
- No

If not, are you willing to develop reporting/
tracking mechanisms?: Y/N

Check which reports are available to customers:

- Weekly Price Lists
- Market Reports
- Monthly Statements
- Velocity Reports
- Other

Mission and Philosophy

It is important to identify farm partners and vendors who understand and are committed to supporting SFA values. To help determine best mission fit, consider asking:

“What is the farm/organization’s mission and/or growing philosophy? [**Lawrence Public Schools**]

Why is the farm/organization interested in selling to the District? [**Alachua County School Board**]

In addition to asking about each vendor’s mission and interest, **Minneapolis Public Schools** asks how vendors will help the district lower costs without compromising core values:

“The District’s key objective is to get the best overall value for our students, taking into account quality, cost, service, diversity, community involvement, sustainability and other relevant values, for the products and services we intend to acquire. Because one of our objectives is to reduce our cost of doing business, how will you help us accomplish this objective without compromising these values?”

SFAs looking to contract with an FSMC may opt to include questions related to a bidder’s interest in and ability to support farm to school program goals. The

TO CONSIDER
This section of the questionnaire may be used as part of the scoring rubric or to collect information about vendor capabilities to inform future solicitations.

examples below come from the **Norwalk Public Schools FSMC RFP**:



“Describe how the FSMC proposes to expand the SFA’s participation in the State Farm to School Program.

Describe the FSMC’s philosophy regarding procurement and use of locally grown produce.

Proposers must indicate the percentage of produce to be sourced locally.

Responses must include a plan for the implementation of scratch cooking, including equipment and training needed for this transition.

Sustainable Growing Practices

There are a number of ways a SFA can assess a vendor’s sustainability practices via the questionnaire. This first example offers a general, open-ended question to the bidder:

“Please describe your farm/organization’s sustainability plan, initiatives, or commitment to sustainable growing practices.



SFAs seeking detailed information about individual farms may include the following questions:

“Farm operations:

- How many acres is the farm operation?
- How many crops do you grow in one year?
- How many crops do you grow at one time?

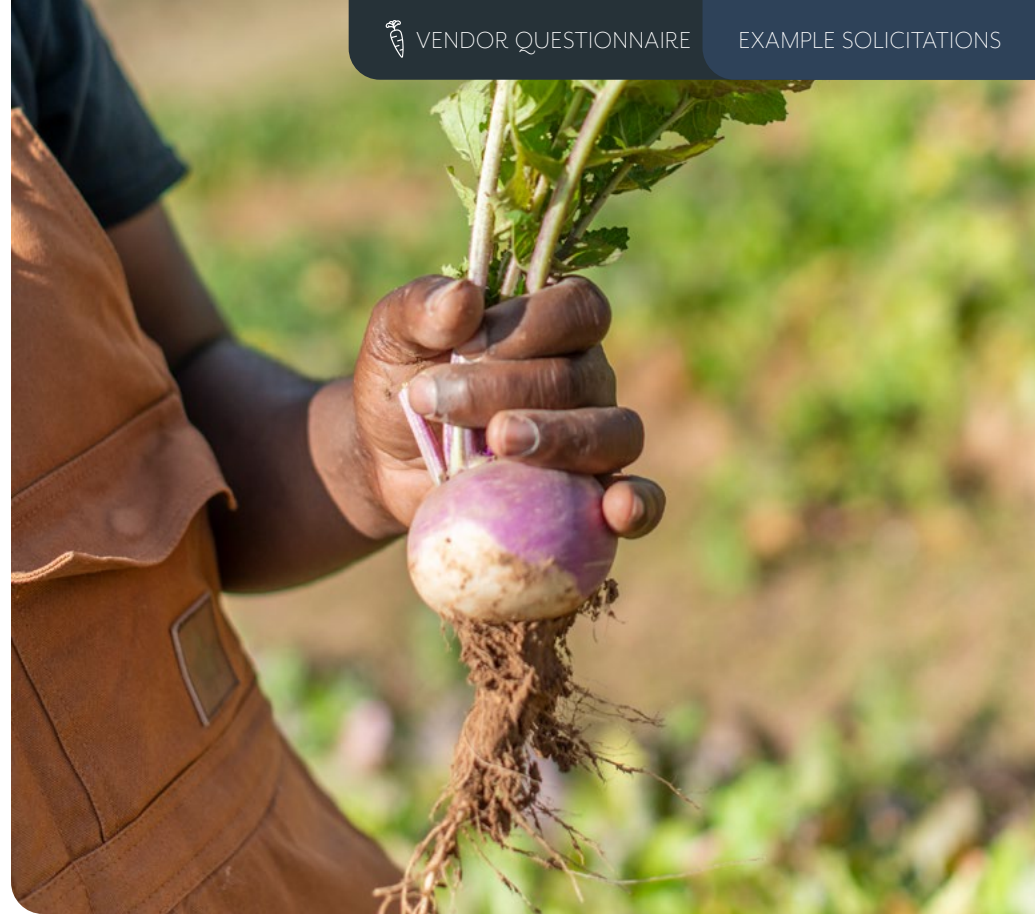
Sustainability-related certifications:

- Certified Naturally Grown
- Certified Organic
- Sustainable growing practices (but no certification)
- Other

For SFAs receiving bids from vendors that work with multiple farms, consider this example from the **Ocean View School District Harvest of the Month RFP**:

“Please tell us how you work with sustainable farms:

- Who are they?
 - Why are they sustainable?
- Do you sell organic produce? Y/N
- From how many farms:
- Do you work with small to midsize family farms? Y/N
- How many:



An SFA that wants to perform a more detailed assessment of sustainable growing practices can use The Common Market’s Farm Impact Assessment (FIA). An alternative to other third-party sustainability certifications, the FIA includes a detailed list of practices related to soil health, biodiversity, pest management, water and energy. SFAs can borrow applicable questions from the assessment to include in a vendor questionnaire.

EVALUATION CRITERIA AND SCORING

This section of the RFP is where programs determine whether a bidder is responsive and responsible: Did the bidder adequately respond to all sections of the RFP? Has the bidder demonstrated their ability to provide the required goods and services if awarded a contract?

Unlike IFBs, RFPs allow SFAs to award vendor(s) that offer the best value to the program—not necessarily to the vendor(s) with the lowest bid price. In this section we focus on how evaluation criteria can target specific values (e.g., sourcing local and/or sustainable products or working with more diverse and socially responsible vendors).



EVALUATION CRITERIA & SCORING EXAMPLES

- Steps to Creating a Scoring Procedure
- Animal Welfare Criteria
- Data Tracking & Reporting Criteria
- Educational Opportunities & Community Engagement Criteria
- Environmental Sustainability Criteria
- Food Service Management Criteria
- Local Sourcing Criteria
- Social Responsibility Criteria

Steps to Creating a Scoring Procedure

1. Determine Award Method

In developing the evaluation criteria and scoring rubric, SFAs should consider whether they intend to award the bid to a single vendor or multiple vendors by offering line-by-line or partial bid award opportunities. Making awards to multiple vendors or on a line-by-line basis allows the SFA greater flexibility in selecting vendors that are best able to meet the program's needs. This approach can also increase participation among vendors who would not typically be able to compete for the full bid opportunity, such as small or new and beginning farmers or local food hubs that only source regional products. The award method may also influence the design of evaluation criteria and scoring.

2. Select Criteria

Decide what values-based criteria will be included in the bid evaluation. It can be difficult to target products or vendors that align with all of a SFA's values. Student, staff, and community engagement, along with an SFA's wellness policy and/or strategic plan, can help determine which criteria to prioritize. Additionally, conducting a market analysis or holding a pre-bid meeting can inform the evaluation criteria by offering insight into products or vendors that can support program goals.

3. Assign Points

Determine how points are distributed across criteria. Each criterion may be assigned a specific number of points, a range of points, or a percentage weight. Although price is the highest weighted criterion, SFAs can choose how many points to assign to price alongside other factors. For example, price may count for 25 out of 100 points as long as no other criteria equals more than 25 points. The amount of points assigned to a given criterion signals to current and future bidders what factors matter most to the SFA.

The evaluation should align closely with the information the bidder is asked to provide as part of the bid response. This may include a completed pricing sheet, answers to the vendor questionnaire, food safety documentation, references, or other required information or documentation. The evaluation section should always include a table or other written description that contains the following information:

- a) **Criteria**
- b) **Description of the criteria and how points will be awarded**
- c) **Basis for scoring** (i.e. Price list, Vendor Questionnaire #, sample report, etc.)
- d) **Maximum points possible for the given criteria**

Among the solicitations reviewed for this report, values-based criteria were most commonly associated with *local sourcing, environmental sustainability, animal welfare, social responsibility, and community engagement*. Below, you will find select criteria and scoring examples in support of these value categories.

Animal Welfare Criteria and Scoring

Animal welfare is not often included as a criterion for meat or poultry bids, as doing so can significantly increase the cost of the protein.

In their evaluation for NY State Beef, **Buffalo Public Schools** awards points as follows:

4 points: Animal Welfare Certification

1 point: Responsible Antibiotic Use

In addition to using animal welfare as an evaluation criterion, **Austin Independent School District** awards points for certified grass-fed beef:

“ Good Food Purchasing Practices

6 points: if Gap Step 4, 5, or 5+, Animal Welfare Approved, Certified Grass-fed by A Greener World



4 points: if Approved American Grass-fed Association Producer, Gap Step (1, 2, -PCO 100% Grass-fed, Certified Humane, or another approved third party certification for grass-fed beef

4 points if Animal Welfare Approved, Food Alliance Certified, Grasslands Alliance Standard, or AGA Grass-fed

TIP | *Even if certification is not required, including animal welfare criteria as part of the evaluation can lead vendors to seek certification in the future.*

Data Tracking & Reporting Criteria and Scoring

SFAs can score vendors based on their ability to monitor and track spend on certain products (e.g., certified products or items that meet the program's definition of local). If requesting traceability or velocity reports, specify the details to include, frequency of reporting, the report format (i.e. Excel spreadsheet, PDF, etc.), and ask how the report will be accessed (via email, online database, etc.). Award points based on the vendor's ability to meet any source-identification and reporting requirements, including report frequency, format, and access.

At a minimum, reports should include the item, origin farm and location, price, and quantity. **Cupertino Unified School District** (California) requests a detailed monthly report to include:

- *Item description*
- *Total cases purchased for the month*
- *Total pounds purchased for the month*
- *Total cost of each item purchased for the month*
- *Overall total amount of local items purchased for the month*

²⁵ See **Sample Local Foods RFP**

²⁶ See **Austin ISD Grass Fed Ground Beef RFP**



In addition to reports, SFAs may also evaluate a bidder's ability to provide source identification on cases, product labels, or invoices. For example:

“Identify place of origin on each invoice if it is different from the farm address²⁵

Provide labels that include the name of the farm/ranch, name of producer, and the address including the zip code²⁶

Educational Opportunities & Community Engagement Criteria and Scoring

SFAs may wish to award points based on a vendor's interest in and ability to provide educational opportunities and support community engagement.

For example, **Minneapolis Public Schools** gives a 10-percent weight around the theme of Community Connection and Values Alignment, defined under the following criteria:

- *Demonstrated interest in Minneapolis Public School sales*
- *Good value for dollar response*
- *Interested in Education/Engagement*

The **Sample Local Foods RFP** template awards up to 23 points for vendors that can meet school interaction criteria including:

- *10 points: Attend 2 school events to promote local*
- *8 points: Host school field trips or tours*
- *5 points: Host school events at farm*



For protein RFPs, the **Austin Independent School District** bid for grass-fed beef awards 5 points to vendors that allow farm-to-production facility tours. The **Montana Beef to School Template** includes optional criteria in the bid evaluation around the farm, ranch, or processing staff's willingness to visit the school district and educate students and/or staff about their operations and product offerings.

Environmental Sustainability Criteria and Scoring

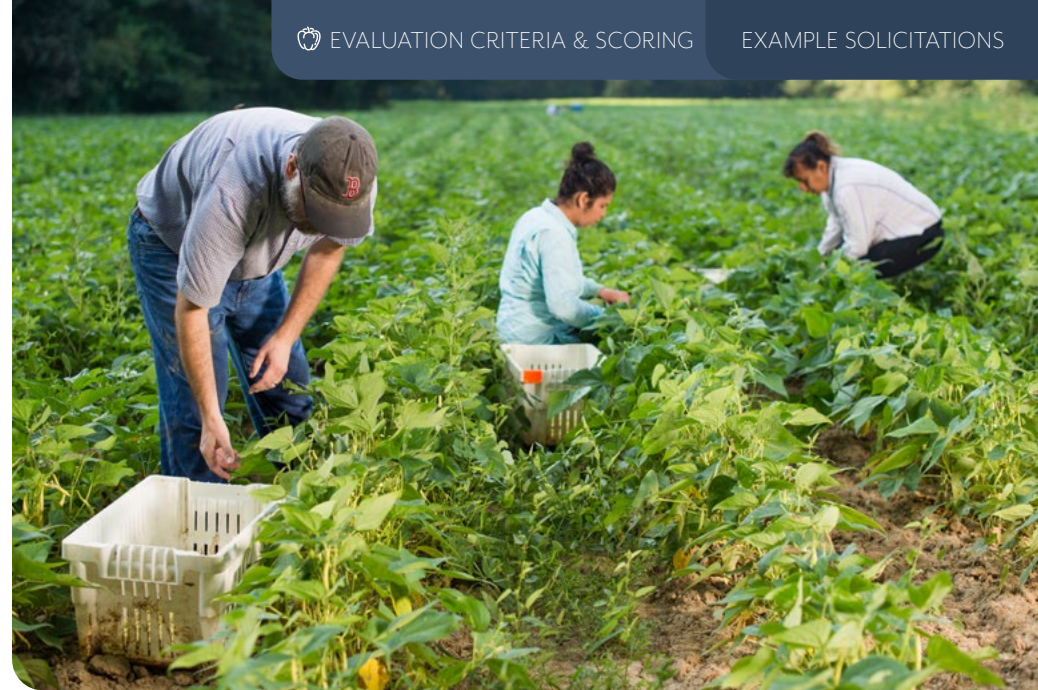
Criteria used to evaluate environmental sustainability may include farm size, organic practices, certifications, and a demonstrated commitment to sustainability.²⁷

The **Sample Local Foods RFP** developed by partners in Maine²⁸ awards points by farm size:

- 5 points: 1-10 acres
- 4 points: 11-50 acres
- 3 points: 51-150 acres
- 2 points: More than 151 acres

Ocean View School District targets sustainable farms or vendors that work with sustainable farms according to on-farm sustainability and organic certification:

- 5 points: Demonstrates a lot of on-farm sustainability
- 4 points: Has proven they work with sustainable farms



- 0 points: Demonstrates no on farm sustainability OR has not proven they work with sustainable farms
- 5 points: Is a certified organic farm
- 4 points: Buys from over 20 organic farms
- 3 points: Buys from 10-20 organic farms
- 2 points: Buys from 5-10 organic farms
- 1 point: Buys from 1-5 organic farms
- 0 points: Buys from 0 organic farms

Other sustainability-related certifications include the following:

- Food Alliance

²⁷ The availability of products from sustainable farms will vary by region. Adjust parameters (i.e. farm size, number of organic farms) to reflect the available products and vendors in your area.

²⁸ This Local Foods RFP template is the product of the Auburn/Lewiston School Departments' Farm to School Implementation Grant 2018-2020 with additional funding support provided by the EB Sewall Foundation and a Maine Farm to Institution mini-grant. Partners on this project include The Maine Farm and Sea Cooperative, St. Mary's Nutrition Center (SMNC), MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.

- *Rainforest Alliance*²⁹
- *ANSI/LEO-4000*
- *Fair Trade Certified*³⁰
- *Salmon Safe*³¹
- *Sustainably Grown*³²
- *USDA Organic (or equivalent certifications such as a local organic certification)*
- *Protected Harvest*³³

A more holistic way to evaluate sustainability is by requesting a sustainable farm plan. The **Sample Local Foods RFP** template awards points for both complete and partial plans:

- *8 points: Written plan*
- *4 points: Partial written plan*

Food Service Management Companies Criteria and Scoring

Evaluation criteria for food service management companies are somewhat more restricted: there are often specific requirements that must be included,

and any state-determined solicitation language can be difficult to change. The examples below demonstrate how SFAs have incorporated aspects of local sourcing, social responsibility, sustainability and animal welfare, and educational opportunities into FSMC evaluation criteria.

In states that have legislation establishing farm to school programs, SFAs can base points on a vendor's ability to support or comply with the goals of the program. For example:

Norwalk Public Schools awards 5 points to vendors that demonstrate support for the Connecticut Farm to School Program. **D.C. Public Schools** also awards 5 points to bidders who use locally grown or raised foods to the maximum extent possible.

In Rhode Island, the **statewide FSMC RFP** incorporates local sourcing into three key evaluation sections (with preference going to vendors that are able to demonstrate the highest percentage of locally sourced items on proposed menus):

15 points: Contractor's understanding of the issues

- *RI Farm-to-School Program including procurement of local foods, school gardens,*



29 For a full description of the certification and requirements, visit <http://www.leonardoacademy.org/services/standards/agstandard.html>

30 For a full description of the certification and requirements, visit <https://www.fairtradecertified.org/what-we-do/what-we-certify/>

31 For a full description of the certification and requirements, visit <https://salmonsafe.org/certification/farms/>

32 For a full description of the certification and requirements, visit <https://www.scsglobalservices.com/services/sustainably-grown-certification>

33 For a full description of the certification and requirements, visit <https://www.protectedharvest.org>

and education related to agriculture, food, health and/or nutrition.

- Procurement of locally grown, harvested, raised and/or processed (RI) fruits, vegetables, dairy and other local food items.

25 points: Work Plan

- Participation in the RI Farm to School Program with activities to include procurement, school gardens, and education related to agriculture, food, health or nutrition.

10 points: Plan to Procure Unprocessed Locally Sourced Items based on total Percentage of Food Cost Dollars Spent on Items Meeting the Local Definition **OR** the total Percentage of Food Cost Dollars Spent on Items Meeting Local and/or Regional Definition

- 10 points: $\geq 30\%$ OR $\geq 50\%$
- 7 points: 25% to $< 30\%$ OR 45% to $< 50\%$
- 4 points: 20% to $< 25\%$ OR 40% to $< 45\%$
- 0 points: $< 20\%$ OR $< 40\%$

In order to verify these amounts, Rhode Island asks vendors to provide planned menus for all programs and meal types and to highlight those food items that meet the local and regional definitions. Vendors must also provide the percentage of total dollars that will be spent on local/regional agricultural products compared to total food cost dollars for each food category, meal type, and overall program.

Finally, vendors are asked to identify existing farmer and other local/regional relationships that can be harnessed, as well as proposed mechanisms for tracking or reporting locally sourced items.

Local Sourcing Criteria and Scoring

SFAs should always apply a geographic price preference to all unprocessed or minimally processed products that meet the program's definition of local. See the **Additional Resources** section for further guidance on applying geographic preference.

Lawrence Public Schools uses a tiered geographic preference approach to target products grown within varying distances of the district. SFAs may choose the percentage preference to apply to their definition(s) of local.

“10%: If a product is grown and packaged or processed within 75 miles of Lawrence High School, a 10% weighted preference will be applied

6%: If a product is grown and packaged or processed within the state of Kansas, a 6% weighted preference will be applied

3%: If a product is grown and packaged or processed within the region, as defined as neighboring states Colorado, Missouri, Nebraska, or Oklahoma, a 3% weighted preference will be

| *applied.*

SFAs may also award points as part of the vendor's overall score to target locally sourced products according to the program's definition. For example, **Buffalo Public Schools** uses this tiered approach to target local produce, which allows smaller, hyper-local urban growers to compete in the bid process.

“15 points: Within the Buffalo City limits

10 points: Within 50-mile radius of Buffalo City

5 points: Over 50 miles radius of Buffalo City

Ocean View School District prioritizes local produce availability by awarding points to vendors who meet the following criteria:

“5 points: Is a local family farm

4 points: Works with about 15 farms located 50 miles or less from District

2 points: Works with about 10 farms located 150 miles or less from District

0 points: Works with at least 5 farms located 250 miles or less from District

In seeking to award a produce bid to a single vendor, **Cupertino Unified School District** (California) awards points based on the percentage of local

produce a distributor can source within 250 miles:

“20 points: 40% or more

15 points: 20-39%

10 points: 1-20%

0 points: 0%

In addition, bidders can earn up to 10 points by providing a sample weekly list of local products that includes item description, pack size, cost per case, and the product origin.

Oakland Unified School District (California) undertook a farm-direct purchase pilot program whereby vendors are asked about their ability to receive, ship, and/or process whole produce directly from local farms selected by the district. Bidders can earn up to 10 points for this section.

10 points: Rated Best Able to Meet Guidelines

5 points: Rated 2nd Best able to Meet Guidelines

3 points: Rated 3rd Best Able to Meet Guidelines

An additional way to evaluate bidders is to assess their efforts to recruit new farm partners, as outlined in **Washington State's Department of Enterprise Services contract**:

| 3 points: What actions is your company taking to

*increase the number of Washington farm suppliers and/or increase the volume of Washington grown products available to buyers?*³⁴

Finally, **Montana's Beef to School template** recommends a reference check to verify that the vendor has a positive track record of working with local farms and businesses.

Social Responsibility Criteria and Scoring

Increasingly, programs are seeking vendors and products that align with values related to equity, diversity, fair labor, and other aspects of social responsibility.

Ocean View School District awards 20 out of 100 total points for organizational equity and diversity using the following system:

“5 points: Lots of staff equity & diversity

5 points: The farm or business is a cooperative or collective

5 points: The farm or business has adopted and/or pays a “living wage policy”

Third-party Labor Certifications for Vendors & Products (including but not limited to Fairtrade, Fair for Life, Food-Justice certification by the Agricultural Justice Project, Equitable Food Initiative or the firm or farm is unionized)

5 points: Total unionized

4 points: A lot of certified products

3 points: Partial unionized

2 points: Some certified products

0 points: Not unionized (no certified products)

As an alternative to requiring official M/WBE certification, **Buffalo Public Schools** awards 5 points to bidders who self-identify as a socially disadvantaged farmer or rancher:

5 points: If you're submitting under the Socially Disadvantaged Farmer or Rancher criterion, identify what group your farm source belongs to for each line item you are bidding on.

Additionally, **Minneapolis Public Schools** awards a 10-percent weight to organizations that are disadvantaged, GLBT, veteran, woman, minority, or nonprofit owned/controlled— a significantly larger and more diverse group than the one in official M/WBE certifications.

³⁴ This example comes from the Washington State Department of Enterprise Services Fresh Produce Bid. Although not a school district, this type of question could be used by a school district.

TERMS & CONDITIONS

Terms and conditions specify the responsibilities of the awarding SFA and its selected vendor(s).³⁵ This section identifies key terms and conditions that a SFA may include to further support local purchasing and other values-based procurement goals. The first set of examples focuses on local purchasing and interlocal or cooperative agreements for programs with self-operating food service. Examples of terms and conditions specific to contracts with food service management companies are included at the end of this section.

Contract terms and conditions can support local procurement by reserving the right to purchase off-contract and allowing for the purchase of new items from contracted vendors. Additionally, interlocal or cooperative agreements allow other SFAs to use a contract without conducting a separate competitive procurement process, which can expand market access for local vendors, as well as streamline the procurement process for SFAs seeking to source local products.

³⁵ United States Department of Agriculture. 2016. Contracting with Food Service Management Companies: Guidance for School Food Authorities. Available from <https://drive.google.com/drive/u/0/folders/19R035LgnmNBzSyGTWjV7koly3ch6hGIL>



TERMS & CONDITIONS EXAMPLES

- Interlocal Agreements & “Piggybacking”
- Purchasing New Products
- Purchasing Off Contract
- Guidance for Food Service Management Companies

TIP | *As with any contract, it is important to consider how an SFA will ensure the vendor is held accountable to the terms of the contract. Using language such as “will” or “shall”—instead of “may” or “can”—is one way to increase accountability. So, too, is including a mechanism for tracking vendor performance.*

An SFA must determine how they plan to manage their contract so as to hold the vendor— food service management company, produce distributor, or local farm partner—accountable to its terms and conditions. Consider your program’s capacity to provide oversight or enforcement of the contract terms—are there feedback mechanisms in place? Any staffing constraints? How will failure to meet the contract terms affect current or future opportunities?—to ensure these terms have the desired impact.

Interlocal Agreements & “Piggybacking”

Interlocal agreements and “piggybacking” are two ways that school districts can streamline the procurement of local products—either for themselves or for other programs. Under an interlocal agreement, contracts made by one district or SFA may be adopted by another district without a separate formal procurement process. Piggybacking also allows other SFAs or school districts to utilize an awarded contract under certain conditions.

The **Cypress Fairbanks Independent School District RFP for Farm to School Produce** (Texas) includes the following interlocal agreement clause:

28.0 Interlocal Agreements with other School Districts

28.2 Adoption of Awarded Contracts – In support of this collaborative effort, all awards made by CFISD may be adopted by other active CTPA member districts. By adopting a contract from another CTPA member district, the adopting district has met the competitive bidding requirements established by the Texas Education Code, Section 44.031(a)(4) and as required by the adopting district’s policies. There is no obligation on either party to participate unless both parties agree. The goods and services provided under the contract will be at the same or better contract pricing and purchasing terms established by the originating district.

The **Sample Local Foods RFP** provides this “piggybacking” guidance for districts:

Cooperative Agreements “Piggybacking” (if allowing)

If the contract allows for an SFA to piggyback on an existing contract, the solicitation and contract must include language for the addition of parties and specified applicable limits. (dollar value/ number of additional parties) SP 05-2017

Purchasing New Products

New local food items—those that weren't available or included in the original RFP—may become available over the course of a contract period. In light of this, The **School Board of Alachua County** (Florida) uses the terms and conditions to ensure its future purchasing power:

The District reserves the right, in its sole discretion, to purchase new additional products from successful Offeror(s) as they become available. Samples may be requested for evaluation purposes. Each item tested must comply with the contract's terms and conditions. The District shall consider product cost and any stated minimum order requirements during the product approval process. Product cost shall be established by direct negotiation with Offeror, taking into consideration the contract's current pricing model. All new product additions shall be subject to review and approval by FNS, and executed by written modification to the contract by the Purchasing Department.

Purchasing Off Contract

To ensure they have the flexibility to source products not available through the contracted vendor—e.g., seasonal items from a local vendor—many SFAs use the terms and conditions to reserve their right to purchase off-contract.³⁶ Be sure that the vendor does not include a limit to what can be purchased off-contract.

Below are examples:

“The District reserves the right to purchase similar items from other sources.” **San Diego Unified School District**

“During the term of this contract, it may be determined that it is in the best interest of the District and California farmers to purchase seasonal, local produce, directly from the farmer or from a secondary vendor, within compliance of State and Federal regulations.” **Cupertino Unified School District**

“If the selected vendor(s) cannot provide products that conform to the specifications and requirements of this document, the District reserves the right to purchase products from other vendors.” **Montana's Beef to School RFP template**

³⁶ United States Department of Agriculture. 2015. Procuring Local Food for Child Nutrition Programs. Available from https://drive.google.com/file/d/1gOTTddoOWBLpcHiSO4UYMCOQeU_aeAVZ/view

Guidance for Food Service Management Companies

Contract terms often stipulate an FSMC agreement to purchase local items when available or to apply a geographic preference for local items (using the SFA's definition of local).

If there is legislation establishing a farm to school program in your state, include terms that require the food service management company's participation in that program (e.g. educational activities, local procurement, progress reporting). For example, the **Louisiana FSMC RFP template** includes the following optional requirements:

If requested by the SFA and included in this contract, the FSMC shall engage in LA's Farm to School program in an effort to connect schools (K-12) with LA / local farms in order to serve healthy meals using locally-produced foods.

The FSMC, as the agent of the SFA, will maximize the use of LA grown/locally grown products, including but not limited to, fruits, vegetable and dairy products, whenever possible, and when purchased by the SFA directly, such fruits, vegetables, and dairy products must be used by the FSMC in the SFA's Food Service Program.

The FSMC shall produce a quarterly report which documents the procurement of LA grown / locally grown products including the local farm source, the product(s) purchased and the value of the products purchased on behalf of the LEA.

In Connecticut, **Norwalk Public Schools** references the state statute to set the terms for local sourcing:

The FSMC shall procure on behalf of the SFA in support of Connecticut's Farm to School Program, Connecticut-grown farm products pursuant to section 22-38d of the Connecticut General Statutes and Public Act No. 16-37.

SFAs can retain the right to purchase from vendors their FSMC does not typically purchase from—and they can require the FSMC's use of that purchased food. The **Virginia Department of Education FSMC RFP template** provides two options:

This contract shall not prevent the SFA from participating in food co-ops or purchasing food from vendors with whom the FSMC normally does not do business. Farm to school, local purchasing, and geographic preference should be identified as included options for the SFA.

Option 1: *[SFA name] reserves the right to make opportunity buys from reputable local farmers*

due to seasonal volume, weather considerations, etc. If product is purchased directly from the farmer or cooperative, the FSMC may be asked to deliver the locally grown products to regular delivery sites.

Option 2: [SFA name] reserves the right to purchase products directly from local producers (farmers), when possible, for the purpose of promoting local products in conjunction with the USDA Fresh Fruits and Vegetable Program (FFVP), Farm to School program, the School Breakfast Program, (SBP), the National School Lunch Program, (NSLP), the Child and Adult Care Feeding Program, CACFP Supper Program, or the Summer Food Service Program (SFSP).

In North Carolina, **Chapel Hill-Carrboro City Schools FSMC RFP** clearly states expectations around submitting local availability for menu consideration:

The Farm-to-School relationship should be enhanced, encouraged, and supported by any vendor supplying goods to SFA. Therefore, SFA shall give preference to items that can be delivered within 24 hours of harvest or production. FSMC is encouraged to regularly submit a list of locally grown, processed, and manufactured items available, based on the SFA's geographic



preference option, for consideration. Products shall be clearly labeled. FSMC shall make a good faith effort to purchase local products first when available. In keeping with SFA's mission of establishing local agricultural partnerships, SFA advocates that a fair price be paid to farmers to help make this important segment of the local economy sustainable.

Policy Support

POLICY SUPPORT

SFAs may include reference to any relevant policies that support values-based procurement goals in solicitations. These policies can be leveraged to inform product specifications, vendor or service-level requirements, procurement targets, and the evaluation of bid proposals. Policy examples include state statutes that establish farm to school programs, district-level wellness or procurement policies, and a Good Food Purchasing Program policy adopted by a local jurisdiction.

Policies can provide a basis for SFAs looking to strengthen their procurement practices by giving preference to bidders who can best meet policy goals. In other cases, policies may even provide a financial incentive—for the district, the SFA, and/or selected vendors—to source more local items (e.g., **NY State 30% Local Food Incentive**; D.C. Healthy Schools Act).

SFAs may also include local, state, or federal policies related to contracting with diverse businesses³⁷.

³⁷ §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

POLICY SUPPORT EXAMPLES

Local Purchasing Goals, Reporting & Incentives

Good Food Purchasing Policy

Contracting & Subcontracting with M/WBE, Small Business, and Labor Surplus Area Firms

Local Purchasing Goals, Reporting & Incentives

The following examples come from SFAs looking to contract with food service management companies. Because they are relying on a third party to make food-sourcing decisions that align with program goals and values, SFAs that contract with FSMCs should pay careful attention to policy language.

D.C. Public Schools include the D.C. Healthy Schools Act Requirements as an appendix to the FSMC RFP. The requirements include the definition of local and regional for the purposes of applying geographic



preference and specify reporting requirements in order for the SFA to receive the 5-cent reimbursement for local foods.

SFAs can use this policy as the basis for specific requirements or preferences related to local procurement in the RFP process. For example, **Mundo Verde Charter School** references the requirements of the Healthy Schools Act when seeking a food service management company:

The Contractor agrees to purchase fruits and vegetables locally-grown when available, identify those specific products, and to provide details of the source of those products to include name of the farm, and contact information of source. That information will be provided according to a schedule that outlines the SFA's reporting responsibilities to the State Agency.

Another example of leveraging state policy to support local procurement comes from Connecticut: The **Norwalk Public Schools FSMC RFP** identifies Section 22-38d of the Connecticut General Statutes and Public Act No. 16-37 as a selected program objective. Under this statute, any bid submitted by a FSMC must include information demonstrating how the bid is consistent with the state's farm to school program, including how the bid facilitates the purchase of local farm products. The statute also

states that, all other factors being equal, preference should be given to the proposal or bid that facilitates local purchases. The RFP notes that the FSMC is required to participate in the District Wellness Committee and comply with the District Health & Wellness Policy. For Norwalk Public Schools, the District Wellness Committee is one of the groups leading farm to school and local sourcing efforts.

Sec. 2. (NEW) (Effective October 1, 2016) Any bid submitted by a food service management company in response to a request for proposals or bid solicitation by a local or regional board of education that is posted to the State Contracting Portal and that relates to such local or regional board of education's school nutrition program shall include information detailing the consistency of such bid with the state's farm to school program, established in section 22-38d of the general statutes and the ways in which such bid facilitates the purchase of products from local farmers by the local or regional board of education, as described in section 22-38d of the general statutes. In the award of any such contract, in accordance with any other statute, regulation or rule concerning such award, all other factors being equal, preference shall be given to the proposal or bid that facilitates such purchase of products from local farmers by the local or regional board of education, as described in section 22-38d of the general statutes.

In Arkansas, Arkansas Code §15-4-3802 is referenced twice in the **Department of Education’s FSMC RFP template** in regards to geographic preference. Under this act, food service management companies, as agents of the SFA, *“will promote, encourage and increase participation in the Arkansas Grown Program using Arkansas grown/locally grown products to the maximum extent practicable, including but not limited to, fruits, vegetables, protein and dairy products, whenever possible, and when purchased by the SFA directly, such fruits, vegetables, protein and dairy products must be used by the FSMC in the SFA’s Food Service Program.”* Additionally, *“the FSMC is encouraged to participate and facilitate involvement and participation in the Arkansas Farm to School Program in an effort to connect schools (K-12) with Arkansas local farms in order to serve healthy meals using locally-produced foods, and participate in relevant state education and marketing initiatives that support farm to school. The FSMC is encouraged to track for the purpose of reporting the use of Arkansas grown products.”*

In North Carolina, state policy allows the SFA to determine the local area to which the geographic-preference option will be applied. The **FSMC RFP from Chapel Hill-Carrboro City Schools** also references federal regulation 7 CFR § 210.21(g)(1), which allows SFAs to apply geographic preference when procuring unprocessed or minimally processed locally grown or locally raised agricultural products. Additionally, the

RFP states that the “SFA and FSMC fully acknowledge and agree that to the extent possible, unless preempted by Federal law or regulations, SFA or FSMC, will use best efforts to purchase agricultural products produced, processed, or grown in North Carolina if the cost and quality are equal.”

The examples above highlight one of the challenges to achieving local sourcing goals when contracting with a third party. Language often directs the vendor to source locally when feasible or encourages (rather than requires) vendors to source local foods. **It can be more difficult to hold vendors accountable for things they are only “encouraged” to do.** Where possible, use language that explicitly directs a vendor to meet specific goals; doing so offers the SFA greater leverage for holding the vendor accountable to the stated policy objectives. Another way to reinforce local or state policies is to evaluate bidders based on their ability to achieve the policy objectives. See the **Evaluation Criteria and Scoring** section for more details on this approach.

Good Food Purchasing Policy

SFAs that operate within a jurisdiction that has adopted a Good Food Purchasing Policy may choose to select a specific value category (or



categories) to be the focus of the RFP. For example, the **Ocean View School District Harvest of the Month RFP** specifically states that the RFP is to help the collaborative purchasing members meet the purchasing goals of the local economics value category. SFAs may choose to target one or more of the value categories within a specific RFP. The Good Food Purchasing Policy program provides many examples of sample procurement language to help achieve values-based purchasing, some of which can be found in other sections of this report.

Contracting & Subcontracting with M/WBE, Small Business, and Labor Surplus Area Firms

SFAs may include any specific policy within their local city, county, or state that includes requirements related to contracting with small, minority, and women business enterprises or labor surplus area firms. If no local policies exist, a district or SFA may include the federal regulation §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms. The regulation below is part of the **Sample Local Food RFP**:

The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women business enterprises, and labor surplus area firms are used when possible. Affirmative steps must include:

1. *Placing qualified small and minority businesses and women business enterprises on solicitation lists;*
2. *Assuring that small and minority businesses, and women business enterprises are solicited whenever they are potential sources;*
3. *Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women business enterprises;*
4. *Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women business enterprises;*
5. *Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and*
6. *Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.*

Additional Resources



ADDITIONAL RESOURCES

Procurement Rules, Regulations, Tools & Templates

In addition to the resources below, consult your state department of agriculture or education agency for local and values-based procurement resources specific to your state.

1. **Procuring Local Foods.** USDA FNS Office of Community Food Systems. <https://www.fns.usda.gov/cfs/procuring-local-foods>

*The USDA FNS Office of Community Food Systems includes links to the “Finding, Buying, and Serving Local Foods Webinar Series,” Buying Local Foods Fact Sheets, the **Procuring Local Foods for Child Nutrition** guide, and policy memos and regulations. Select fact sheets include:*



- ▶ **Decision Tree: How Will You Bring Local Foods into the Cafeteria with Your Next Food Purchase?**
- ▶ **Geographic Preference: What It Is and How To Use It**
- ▶ **Local Meat in Child Nutrition Programs: Increasing Opportunities for Small and Mid-Sized Livestock Ranchers and Fishers**

2. **Implementing Farm to School Activities: Food Safety.** USDA Office of Community Food Systems. <https://www.fns.usda.gov/cfs/implementing-farm-school-activities-food-safety>

This website from USDA includes a list of food safety resources organized by topic area that provides basic definitions of food safety terms and links to sites with more information. These resources may be used by school food service as well as growers.

3. **Local Food Procurement Toolkit.** Vermont FEED. <https://vtfeed.org/local-food-procurement-toolkit>

This toolkit includes Values-Based Tiered Buying Resources, editable Informal Solicitation Bid Templates, and editable Vendor Response Sheet Templates.

4. **Local Foods Resources for Schools.** Maine Farm and Sea Cooperative. 2020. <https://www.maineфарmandsea.coop/local-foods-resources>
MFSC has created materials to help schools develop Request for Proposals to incorporate more local foods into their menus, including a sample local foods RFP, forward contract, and evaluation spreadsheet.

5. **Food from Farms: Toolkit for Direct Purchasing of Local Food.** Minnesota Institute for Sustainable Agriculture. 2017. <https://drive.google.com/file/d/1NjzTL86SMBTMMhrQTz97pe9ggiUvldOO/view>

This toolkit includes templates for menu planning, request for quotes, informal procurement log, procurement categories and points criteria, scoring worksheet, and sample contract.

6. **Sourcing Local Foods: Understanding Procurement Rules and Regulations Webinar.** Michigan Center for Regional Food Systems. February 17, 2017. Abby Harper, Aimee Haapala. https://www.canr.msu.edu/resources/sourcing_local_foods_understanding_procurement_rules_regulations_webinar

This webinar provides training for local procurement rules and regulations, including a review of procurement principles, where to include values-based language, and a review of different procurement methods.

7. **A Guide to Developing a Sustainable Food Purchasing Policy.** Sustainable Food Policy. https://drive.google.com/file/d/1BPokmv8X2WAuOiUs8MrEwhRR_zGfz4WI/view?usp=sharing

This guide includes an action-planning framework for developing a sustainable food purchasing policy, including how to apply the policy in a competitive bid process. The guide covers establishing a vision, setting goals, ensuring compliance, action planning, evaluation, and includes an appendix of food-related claims and certifications.

- 8. Solicitations Toolkit - How to Develop Successful Values-Driven Solicitations.** The Center for Good Food Purchasing. https://drive.google.com/file/d/1Yaqxh9hv7itwmFNZunlbWYEqsYi_xpml/view?usp=sharing

The overarching purpose of this Solicitations Toolkit is to empower you to use your solicitation documents as a key tool for achieving and expanding your goals for the Good Food Purchasing Program (the Program). We understand that you have unique strengths, constraints, and action items, so this Solicitations Toolkit is designed to be useful whether you are just beginning to incorporate the goals of the Program into your

solicitation documents or you are a pro at using your solicitations as powerful tools to increase your good food purchases.

- 9. A Good Food Cost Management Analysis.** The Center for Good Food Purchasing. <https://drive.google.com/file/d/1lj0cWajVbqOuG6ApO7m4X7jkclc0VnOT/view?usp=sharing>

The Center for Good Food Purchasing (Center) commissioned this report for the benefit of local coalition partners and institutions who are making the case for adopting the Program or already implementing it. Based on quantitative purchasing data collected by the Center and qualitative interview data, this report identifies cost management strategies for institutions participating in the Program, clarifies the realities of cost management in values-based purchasing, and examines the cost differences between qualifying and non-qualifying items and any identifiable trends therein.

Procurement Policy Research & Reports

1. **State Farm to School Policy Handbook: 2002-2020.** National Farm to School Network and Center for Agriculture and Food Systems. July 23, 2021. www.farmentoschool.org/resources-main/state-farm-to-school-policy-handbook

The State Farm to School Policy Handbook: 2002-2020 is a tool for those working to advance the farm to school movement. The Handbook summarizes and analyzes bills and resolutions introduced between January 1, 2002, and December 31, 2020, from the 50 states, the District of Columbia, and the U.S. territories. It enables users to search bills by both jurisdiction and topic.

2. **State Legislation and Policy Reports.** School Nutrition Association. schoolnutrition.org/legislationpolicy/statelegislationpolicyreports/

SNA provides a quarterly report of state legislation. The report takes a look at the key issues trending across the country and provides the latest updates on the status of each bill, including legislation supporting farm to school and local procurement.

3. **A 50-State Policy Scan on the Role of State Procurement Policy on Buying Colorado Food.** Colorado Food System Advisory Council.

June 24, 2021. <https://drive.google.com/file/d/1UgYwHjg85cyPXLHHTcWMIh-vh2DIU8/view?usp=sharing>

This report outlines the current state of procurement regulations in Colorado that provide a preference for Colorado produced foods; highlights examples of local food procurement policies from other states; summarizes evidence of other states' local food procurement policies impacts, and provides recommended next steps for the State of Colorado.

4. **Farm to School Literature Review.** March 2021. Ellen Bobronnikov, Maria Boyle, Michel Grosz, Ian Lipton, René Nutter, Melissa Velez, and Liz Yadav. https://drive.google.com/file/d/1u2Q8hrjzltFMALJDIXgRO5WEq_NrSaIV/view?usp=sharing

This document summarizes the results of the review of literature relating to farm to school activities published from 2010 to 2019. Main topics include the economic contribution of farm to school and procurement processes across various geographies; impacts of farm to school efforts on food growing, serving, and purchasing on schools, districts or SFAs; and how farm to school programs and activities have impacted changes in policy.

5. **Regional Trends in New England Farm to Institution Procurement Policy.** Farm to Institution New England, Vermont Law School Center for Agriculture and Food Systems, USDA National Agricultural Library. August 2019. <https://drive.google.com/file/d/1NjzTL86SMBTMMhrQTz97pe9ggIUv1dOO/view?usp=sharing>

This report compiles and distills individual policy snapshots for each New England state, offering a glimpse at how institutions across the region procure local foods. Students and faculty analyzed state procurement policy trends, accomplishments, and gaps; interviewed key stakeholders; and made recommendations for strengthening state procurement policy to advance local food purchasing.

6. **Public Investment in Farm to School: Lessons from State Policies.** Massachusetts Farm to School. 2018. <https://drive.google.com/file/d/1bo9tG72ZvScwlttdt-xmVhmp9vwQey9L/view?usp=sharing>

This report explores opportunities to use state level policies to expand farm to school activity. The report describes grant program legislation enacted in the 17 states, outlines lessons learned from stakeholder interviews, and sets forth issues for stakeholders to consider when proposing legislation in Massachusetts.

7. **Instituting Change: An Overview of Institutional Food Procurement and Recommendations for Improvement.** The Johns Hopkins Center for a Livable Future. Claire Fitch and Raychel Santo. February 2016. https://drive.google.com/file/d/1OmGiv760cKSX9ZQjcxj0E8GDbb_OFeWh/view?usp=sharing

This report reviews the literature and key information resources regarding institutional food service procurement systems, presents the potential benefits of a large scale shift among institutional procurement policies, discusses some of the existing barriers to the adoption of policies that favor regionally and/or sustainably produced food, and provides recommendations and tools for influencing institutional food procurement practices

8. **A Cross-Sector Approach to Institutional Food Procurement: How Schools and Hospitals Can Organize Together for Healthier Food.** Harrison Institute for Public Law Georgetown Law, Health Care Without Harm, and School Food Focus. https://drive.google.com/file/d/13Aid8n67lmZIKghSO9WvgP_kT6AvnwK9/view?usp=sharing

This document provides a resource for schools and hospitals similarly dedicated to procuring sustainable and healthy foods for their institutions by utilizing a step-by-step approach to collaborative

procurement analysis. It includes a brief overview of the regulatory frameworks under which ProCureWorks (PCW) schools and hospitals operate, describes each of the four cross-sector procurement methods, lays out administrative steps

to be taken and analyzes the potential advantages, disadvantages, and areas of legal concern for each method, and analyzes how to combine the legal constraints with organizational priorities, using PCW as a case study.

Contracting with Food Service Management Companies for Local Procurement

1. **Leveraging Contracts for Local Food Procurement: A Guide for Institutions that Work with Food Service Management Companies.** Farm to Institution New England. August 2015. <https://drive.google.com/file/d/1MVHzmXLu4mfBBjqj83T6iwx8ycHexMZ0/view?usp=sharing>

This guide aims to assist institutions that are managed by FSMCs in influencing the request for proposal (RFP) and contract negotiation processes to increase purchases of local foods. The guide describes the different contract types typically used with FSMCs and how local food procurement is incorporated; the role of the RFP and provides questions to consider when soliciting proposals to find a company that best meets the institution's needs; key components of typical contracts that need to be negotiated to improve the ability of institutions to purchase

local food products; and provides sample RFP and contract language.

2. **Setting the Table for Success: A Toolkit for Increasing Local Food Purchasing by Institutional Food Service Management.** Farm to Institution New England. 2016. www.farmtoinstitution.org/food-service-toolkit

This toolkit was designed to help individuals understand the process to request proposals from and negotiate contracts with food service management companies in order to maximize opportunities to incorporate regional food. However, these tools are also applicable to self-operated facilities for use in setting internal goals and contracting with group purchasing organizations or directly with suppliers.

Data Collection, Evaluation & Impact Reporting

1. Good Food Purchasing Program Impact Hub impacthub.goodfoodpurchasing.org/

Use the Impact Hub to calculate the impact of various sourcing strategies, such as increasing local purchases, increasing fruit and vegetable purchases, replacing conventional with organic produce, prioritizing farmworker rights, or increasing purchases of high animal welfare products.

2. National Farm to Institution (FTI) Metrics Collaborative ftimetrics.localfoodeconomics.com/

The FTI Metrics Collaborative is a group of national farm to institution leaders dedicated to developing best practices for measuring the impact of the institutional market across the supply chain. The collaborative seeks to develop a common set of food procurement metrics, benchmarks, and best-practices for institutional dining and food service that promote the health and resilience of their community's economic, ecological, and social systems. The collaborative is trying to standardize six metrics around farm impact, including: business type, ownership, farm impact, farm identity, product type, and market channel.

3. Project Waste Not www.projectwastenot.com/

Project Waste Not aims to reduce food waste by making real time data from buyers and suppliers more readily available, enabling innovative solutions, and ultimately driving more efficiencies in the food system. Their Open Food and Beverage Commerce Network is a simple interface that stores purchasing data (including a buyer's purchases by product, farm, and location). This data source could assist buyers, like SFAs, maintain reliable, organized data.

4. Locally Grown & Unprocessed Tracking Log. Office of the State Superintendent of Education. osse.dc.gov/fr/publication/locally-grown-and-unprocessed-food-item-tracking-log

As required by the Healthy Schools Act (HSA), public and public charter schools shall serve locally grown, locally processed, and unprocessed produce from growers engaged in sustainable agriculture practices whenever possible. To that end, Local Education Agencies (LEAs) are required to report to OSSE the local foods served as part of the school meal programs using the Locally Grown and Unprocessed Food Item Tracking Log (Tracking Log) on a quarterly basis.

5. **Getting Down to Details: How to Use Velocity Reports to Up Your Game on Sourcing Local Food** (webinar recording and slide deck). New England Farm & Sea to Campus Network (FSCN) and Farm to Institution New England (FINE). November 2017. www.farmtoinstitution.org/blog/getting-down-details-how-use-velocity-reports-your-game-sourcing-local-food

This webinar includes five actionable tips to demystify the task of making the shift to local products and harness the power of purchasing data to prioritize and plan.

Identifying Farm to School Peers and Networks

1. **National Farm to School Network**
The National Farm to School Network (NFSN) is an information, advocacy and networking hub for communities working to bring local food sourcing and food and agriculture education into school systems and early care and education environments. SFAs can tap into their state networks, identify best procurement practices within their state and local communities, engage in peer-to-peer sharing, and more. NFSN's state partner organization contact information is [here](#).
2. **USDA Farm to School Regional Leads**
USDA's Office of Community Food Systems (OCFS) has Regional Leads in all 7 Regional Offices. Regional Leads can provide local procurement training and technical assistance, identify best practices, and connect SFA's to lead farm to school practitioners in their states. Regional Lead contact information is [here](#).



Appendix

Solicitation References

KEY

SCHOOL DISTRICT SIZE

- (S)** Small: <5,000 students
- (M)** Medium: 5,000 – 25,000 students
- (L)** Large: >25,000 students

USDA FOOD & NUTRITION SERVICE REGIONS

Western: WA, OR, CA, ID, NV, AK

Mountain Plains: MT, WY, CO, ND, SD, NE, KS, MO

Southwest: UT, AZ, NM, TX, OK, AR, LA

Midwest: MN, IA, WI, IL, MI, IN, OH

Southeast: KY, TN, MS, AL, GA, NC, SC, FL

Mid-Atlantic: NJ, DE, MD, DC, PA, WV, VA, PR

Northeast: NY, CT, RI, MA, VT, NH, ME

APPENDIX: SOLICITATION REFERENCES

Category	Type	Title	Year	District or Source	Size	State	Region
Produce, Local	RFP	Sample Formal Local Foods Request for Proposal, Price Sheet	2020	Created in partnership by Auburn Schools, Lewiston Schools, Saint Mary's Nutrition Center, Maine Farm and Sea Cooperative, MeFTI, Portland and Falmouth Schools, Cultivating Community, Somali Bantu Community Association and Maine Department of Education, Child Nutrition Program.	(S) (M)	ME	Northeast
Produce, Local	RFP	RFP for Farm to School Fresh Produce, Price Sheet	2019	Minneapolis Public Schools	(L)	MN	Midwest
Produce, Local	RFP	Harvest of the Month RFP, Scoring Rubric	2021	Ocean View School District / Ventura County farm to School Collaborative	(M)	CA	Western
Produce, Local	RFP	Farm to School Produce for Nutrition Services, Price Sheet	2021	Cypress Fairbanks Independent School District	(L)	TX	Southwest
Produce, Local	IFB	Locally Grown Fresh Fruits and Raw Vegetables, Farm to School Checklist, Price Sheet	2021	Durango School District 9-R	(M)	CO	Mountain Plains
Produce, Local	RFP	Farm-to-School Fresh Produce, Price Sheet	2021	School Board of Alachua County	(L)	FL	Southeast



LOCAL
PRODUCE

GROW THE LIST!

Submit your own solicitation examples to add to the list! Email a copy of your solicitation language to schoolfood@thecommonmarket.org to be considered as an addition to this Appendix. Thank you for your help in keeping this list inclusive and full of inspiration!

Category	Type	Title	Year	District or Source	Size	State	Region
Produce, Local	RFP	Request for Proposals for Fresh Produce, Price Sheet	2018	Lawrence Public Schools USD 497	(M)	KS	Mountain Plains
Produce, General + Local	RFQ	Produce, Fresh Fruits and Vegetables	2018	Oakland Unified School District	(L)	CA	Western
Produce, General	RFP	Informal Request for Proposal - Produce, Price Sheet	2020	Ocean View School District	(M)	CA	Western
Produce, General	RFP	Fresh Produce, Price Sheet	2013	San Diego Unified School District	(L)	CA	Western
Produce, General	RFB	Request for Fresh Produce Bid	2016	Cupertino Unified School District	(M)	CA	Western
Produce, General	RFP	Request for Pricing for Fresh Produce	2017	Monterey Peninsula Unified School District	(M)	CA	Western
Produce, General	RFP	Fresh Produce Request for Proposal	2017	Livingston Union School District	(S)	CA	Western
Produce, General	RFP	Supply & Delivery of Fresh Produce	2017	Mundo Verde Public Charter School, D.C. Child Nutrition Services	(L)	DC	Mid-Atlantic
Produce, General	RFP	Produce, Pricing Sheet	2021	Buffalo Public Schools	(L)	NY	Northeast



GENERAL PRODUCE

Category	Type	Title	Year	District or Source	Size	State	Region
Produce + Protein, Local	RFP	Cooperative Group Geographic Preference Bid, Price Sheet	2021	Broome-Tioga BOCES	(L)	NY	Mid-Atlantic
Protein, Beef	RFP	Grass Fed Ground Beef	2019	Austin Independent School District	(L)	TX	Southwest
Protein, Beef	RFP	New York Protein, Pricing Sheet	2021	Buffalo Public Schools	(L)	NY	Northeast
Protein, Beef	RFP	Beef to School Template, Price Sheet	-	Montana State University - Beef to School	N/A	MT	Mountain Plains
Processing, Beef	RFP	NY Beef Processing, Pricing Sheet	2021	Buffalo Public Schools	(L)	NY	Northeast
FSMC	RFP	Request for Proposal/ Contract: FSMCs	2019	Norwalk Public Schools	(M)	CT	Northeast
FSMC	RFP	FSMC RFP Template ¹	2021	Office of the State Superintendent of Education	(L)	DC	Mid-Atlantic
FSMC	RFP	Statewide School Food Services Program	2020	Rhode Island Department of Education	N/A	RI	Northeast



LOCAL PRODUCE +
PROTEIN



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¹ This template is missing required civil rights language. Please check with your procurement office for required language.

Category	Type	Title	Year	District or Source	Size	State	Region
FSMC	RFP	Port Angeles School District FSMC RFP	2019	Port Angeles School District	(S)	WA	Western
FSMC	RFP	Request for Proposal - FSMC	2020	District of Columbia Child Nutrition Programs	(M)	DC	Mid-Atlantic
FSMC	RFP	Request for Proposal and Contract	2019	State of NJ Template	N/A	NJ	Mid-Atlantic
FSMC	RFP	Request for Proposal and Contract	2021	Chapel Hill-Carrboro City Schools	(M)	NC	Southeast
FSMC	RFP	FSMC RFP and Contract	2021	Arkansas Department of Education	N/A	AR	Southwest
FSMC	RFP	FSMC RFP/Contract Template	2020	Virginia Department of Education	N/A	VA	Mid-Atlantic
FSMC	RFP	FSMC RFP, Attachment ¹	2022	Camden City School District	(M)	NJ	Mid-Atlantic
FSMC	RFP	FSMC RFP	2021	Southern University and A&M College Laboratory School Baton Rouge, LA	(S)	LA	Southwest
Pre-Plated Meals	RFP	Request for Proposal: Pre-Plated Meals	2016	School District of Philadelphia	(L)	PA	Mid-Atlantic



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