Finding, Buying and Serving Local Food
Using Specifications, Requirements, and Evaluation Criteria to Target Local Products
March 13, 2014

Housekeeping

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- To make a comment or ask a question:
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- The webinar will be recorded and available on the USDA Farm to School website: http://www.fns.usda.gov/farmtoschool/webinars

Poll: Who is on the line?

Our Presenters

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Overview

- Procurement basics
- Three ways to use specifications and evaluation criteria to target local foods
- Practice using specifications
- Questions

Buying Local

1) What: Which types of products?
2) Where: From which sources?
3) How: The mechanics of sourcing local correctly.
   > Today: Using specifications and evaluation criteria to target local products
What? Which Types of Products

- Vegetables
- Meats, Poultry, and Fish
- Dairy, Eggs, and Dairy
- Fruits
- Cereals

What? Defining Local

Ways to define local:

- Mile Radius
- County
- State
- Region

Can vary by:

- Product
- Season
- Special event

Procurement Methods

< Small Purchase Threshold >

- Informal
  - Small Purchase
  - Requires price quotes from 3 bidders
- Formal
  - Sealed Bids (IFBs)
  - Competitive Proposals (RFPs)
  - Requires public advertising

Sections of a Solicitation

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

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Using Specifications, Vendor Requirements, and Evaluation Criteria to Target Local Products
“Local” Can’t Be Used as a Specification

FNS regulations and guidance make clear that “local” (or any geographic area) cannot be used as a product specification or a vendor requirement. Therefore, this is not allowed:

“This solicitation is for flour from wheat grown and processed within 100 miles of Schmoetown.”

Potential Specifications, Requirements, and Evaluation Criteria to Target Local Products

Such as:
- Particular varieties unique to the region
- Freshness (e.g., Delivered within 48 hours)
- Size of farm
- Harvest techniques
- Crop diversity
- Origin labeling
- Able to provide farm visits or class visits

Other Things to Consider When Writing Solicitations to Target Local Products

- Be flexible
- Don’t include unnecessary requirements
- Consider what a vendor new to the school food market might not know
  - Condition upon receipt of product
  - Food safety needs
  - Size uniformity

Additional Production Standards

- Certified Organic
- No-till
- Pesticide Free
- Grass-fed
- Cage Free

Three Ways to Use Solicitation Language to Target Local Products

1. Use product specifications
2. Use additional requirements to determine vendor responsiveness
3. Use criteria to evaluate vendor proposals

Use Product Specifications to Target a Local Item

Consider requesting:
- A variety that is unique to the region
- Products are delivered within 24 or 48 hours of harvest
**Example: Use Product Specifications**

**Product Specification**
- Granny Smith, US. Fancy, 5 - 185 count boxes per week for September - December

**Example: Use Product Specifications**

**Product Specification**
- Granny Smith or local variety, US. Fancy or No. 1, Prefer 5 - 185 count boxes per week but willing to consider other pack sizes for September – December
- Delivered within 48 hours of harvest

**Use Additional Requirements to Determine Vendor Responsiveness**

- Remember that you must award to a vendor who is both responsive and responsible!
- Evaluate responsiveness in any procurement method – IFB, RFP or informal.
- All vendors must be able to provide the products you need to be considered responsive. You can include additional vendor, including:
  - Able to provide farm visits
  - State of origin or farm origin labeling
  - Provide products grown on a particular size farm

**Example: Use Criteria to Determine Responsiveness**

**Product Specification**
- Green apples, US. Fancy or No. 1, prefer 5 185 count boxes per week but willing to consider other pack sizes for September - December

<table>
<thead>
<tr>
<th>Contractor ability to meet all specifications</th>
<th>Apple Lane</th>
<th>Giant Granny’s</th>
<th>Fred’s Fuji’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product quality</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Delivery</td>
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<tr>
<td>Packaging and labeling</td>
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<td>✓</td>
<td>✓</td>
</tr>
<tr>
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**Use Criteria to Evaluate Vendor Proposals**

- Use those same criteria mentioned before, but assign weights to evaluate in an RFP.
- The amount of weight determines how important the criterion is.
- To evaluate responsiveness think about including:
  - Able to provide farm visits
  - State of origin or farm origin labeling
  - Provide products grown on a particular size farm
Product Specification
- Green apples, US. Fancy or No. 1, prefer 5-185 count boxes per week but willing to consider other pack sizes for September - December

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<tbody>
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<td>30</td>
<td>40</td>
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<tr>
<td>Contractor ability to meet all specifications</td>
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<td>20</td>
<td>40</td>
</tr>
<tr>
<td>Delivery = 10</td>
<td>30</td>
<td>30</td>
<td>40</td>
</tr>
<tr>
<td>Packaging and labeling = 5</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Total possible points</td>
<td>100</td>
<td>100</td>
<td>100</td>
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Example: Use Criteria in an RFP

Poll: Which specifications, requirements, or criteria have you used?

Using Specifications: Practice!

Strawberry Solicitation - Before
- Packed: 8 1-pound clam shells per flat
- Quality: US Grade No. 1, cap (calyx) attached, picked ripe, firm, store at 40 degrees or below if held over 24 hour period prior to pick up. Acceptable size: Large — Greater than 1 inch in diameter
- Delivery: 5600 flats to be picked up from producer on April 28, April 30, May 5, May 7, May 11, and May 14.

Strawberry Solicitation - After
- Packed: 8 1-pound clam shells per flat
- Quality: US Grade No. 1, cap (calyx) attached, picked ripe, firm, store at 40 degrees or below if held over 24 hour period prior to pick up. Acceptable size: All sizes.
- Delivered no more than 48 hours from harvest.
- Delivery: 5600 flats to be picked up from producer on April 28, April 30, May 5, May 7, May 11, and May 14.
Dairy Distributor Solicitation - Before

The vendor will be able to:
• Deliver to 10 school sites weekly
• Hold liability insurance
• Provide 3 references
• Deliver products that meet product specifications

Dairy Distributor Solicitation - After

The vendor will be able to:
• Deliver to 10 school sites weekly
• Hold liability insurance
• Provide 3 references
• Deliver products that meet product specifications
• Offer visits to all 6th grade classrooms
• Label products with the county of origin
• Provide a list of local producers it routinely works with

Example: San Diego Unified

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

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• Delivered directly to multiple SDUSD school sites (not a central warehouse). The number of drops is to be determined by the district on a case-by-case basis;
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Farm to School Resources

• USDA Farm to School Website and E-Letter (at www.fns.usda.gov/farmtoschool)
• Farm to School Census
• Farm to School Regional Leads
• More procurement resources coming soon!