



# Integrating Values-Based Local Food Procurement



## How Can Schools Integrate Values-Based Local Food Procurement?

These are instructions to guide school nutrition personnel and their advocates in streamlining their local food procurement process, develop bidding criteria beyond just price, and help vendors respond to bid solicitations. By sending out solicitations to farmers, producers, food hubs, and distributors, you are communicating that your school is a serious and viable customer who is interested in more than low prices.

These instructions are primarily meant for Informal Solicitations of local food. Each state determines the threshold. Over that amount in a solicitation warrants a Formal Bid (which can still have values statements and criteria, but the requirements are different.) In Vermont, the threshold is \$250,000, so any solicitation bid under that amount is considered informal and only requires three bids.

## A Step-By-Step Guide for Informal Bid Solicitations

### 1. Articulate a Purchasing Values Statement with your staff and farm to school committee

Fill out the Vermont FEED Local and Values Based Purchasing Action Plan with your farm to school committee or at least your school nutrition staff so you clearly articulate what local or regional foods you are looking for and why.

With the values statement, develop a statement about your farm to school program and your support of the local economy that will be used as the introduction for all your bids. For example:

“We value engaging students in active learning about nutrition, healthy food choices and a local farm economy. We are building life-long skills that impact personal and community well-being now and in the future.”

“We celebrate our cafeteria’s commitment to locally sourced, “from-scratch” meals and work hard to help students understand the importance of environmental sustainability, civic engagement, and personal wellbeing through cross-curricular explorations of our regional food system.”

### 2. Identify vendors you are currently working with, or want to work with.

Define what it is about these vendors that determine why you purchase from them (such as: quality of products, type of service, willingness to participate in school events?)

### 3. Determine which programs you want to develop a bid for and what products

- Determine product volumes and specifications
- Determine if you want bids for a week, month, season, or all year
- Determine vendor specifications (Step 2)

### 4. Write up your solicitation

- Write up a statement about your farm to school program, what you value, what program you are trying to buy for, and the product and service criteria important to you (see examples)
- Indicate how many schools, students, days of operation, and grades you serve
- Write up specifications about the products you want from Step 3 (i.e. variety of sizes acceptable but prefer medium size, variety of colors, a diversity of seasonal fruits and vegetables)
- Write up vendor requirements you want from Step 2 (i.e. farm of origin identification, willingness to host farm field trips, proof of farm or food safety plan, quality customer service, rapid return policy, timely responsiveness to inquiries, communicate via e-mail or telephone, any changes in products or quantity need to be called in 24 hours prior to delivery, etc...)
- Create a vendor response sheet that list the vendor criteria you created in Step 2.
  - Vendors must first meet all the criteria, then you have to accept the lowest price among the qualified vendors.
  - Include when the bid is due, how they will be notified, and when you will start the ordering.



### 5. Sending out the solicitation

For an informal bid (any bids under \$250,000), you decide who you will contact for 3 different bids. If you have criteria other than price, you must share them with every vendor you select. Call or send written solicitation to the vendors so they are clear about your specifications.

*NOTE: Prices alone can be verbal or written quotes provided by the vendor, posted prices found in promotional materials, catalogs, or stores.*

### 6. Document!

Write down all responses that you received and which vendor you went with at what price. Be sure to manage the contract and evaluate your vendor's performance all year, so that you can use that information to define their 'responsiveness' and 'responsibility' for next year.

## Hints!

For either a formal or informal solicitation, you can state that you prefer local with **Geographic Preference**. Schools define 'local' and award a percent or point preference for those vendors who can supply products (only fresh produce, ground beef, fresh eggs) that meet the local definition (or a portion).

Schools can choose to base the solicitation on an index (set by an uninterested party) such as organic, USDA index, retail, etc... and a set fee per unit. For instance: USDA Terminal Market price plus a dollar price per case or unit as your price measurement.

With a bid that has multiple produce items (see Produce Market Basket Specifications Bid Template in **our toolkit**), add language to award to multiple vendors or by line item so the vendor doesn't have to bid on every item. If a school wants many items bid on at once, as is often the case with produce, the school can list key, higher volume, frequently purchased items rather than all items.

Within your criteria, clearly state farm to school services you would like (i.e. provides taste tests at least twice a year or provides a farm field trip).

If the lowest bidder is not able to fulfill all the needs as contracted due to supply limitations, the school can reserve the right to award multiple bids moving on to the vendor who was next in line in terms of price. If you want this condition, then the language needs to be included in the solicitation.



Photos courtesy USDA



Vermont FEED is a Farm to School partnership project of NOFA-VT & Shelburne Farms. Learn more @ [vtfeed.org](http://vtfeed.org).