



# Putting the Puzzle Pieces of Procurement Together

---

---

**Purchasing**  
**Vs**  
**Procurement**





**What are your  
procurement pain  
points?**



# Finding Solutions

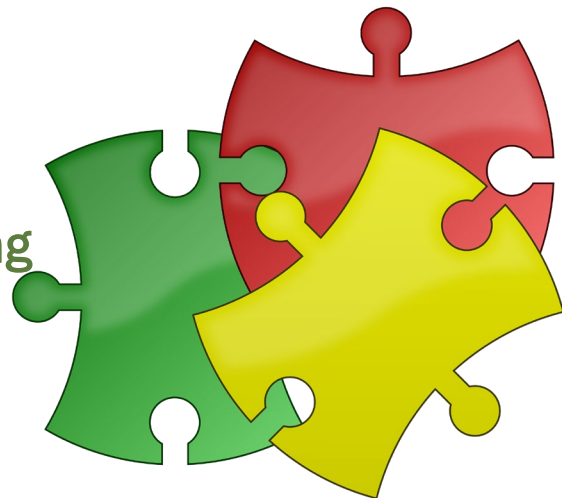
---

What kind of a customer am I?  
Who would want to do business  
with me?

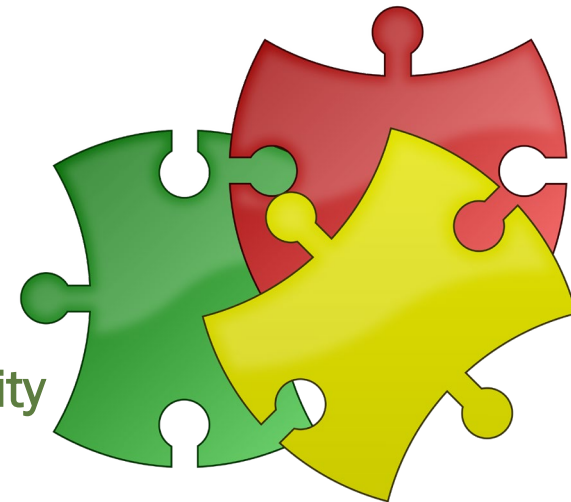
# Identifying Puzzle Pieces

---

- ❖ Forecasting/Identifying Needs
- ❖ Determination of Specifications
- ❖ Announcing the Bid
- ❖ Timelines
- ❖ Negotiations
- ❖ Ordering/Purchasing



- ❖ Receiving
- ❖ Record Keeping
- ❖ Commitments
- ❖ Review and Assess
- ❖ Building Relationships
- ❖ Conquering Fear and Absurdity





- ❖ Identifying needs based on cycle menus
- ❖ Look at past forecasting for accuracy
- ❖ Identify any changes or special events
- ❖ How do USDA foods fit in?
- ❖ Reduce orders to accommodate USDA foods

# Forecasting





- ❖ Clearly written specifications for food
- ❖ Clearly defined requirements for contracted purchasing services
- ❖ Values incorporated and clearly defined
- ❖ Metrics identified for scoring method
- ❖ More than just price

# Determination of Specifications

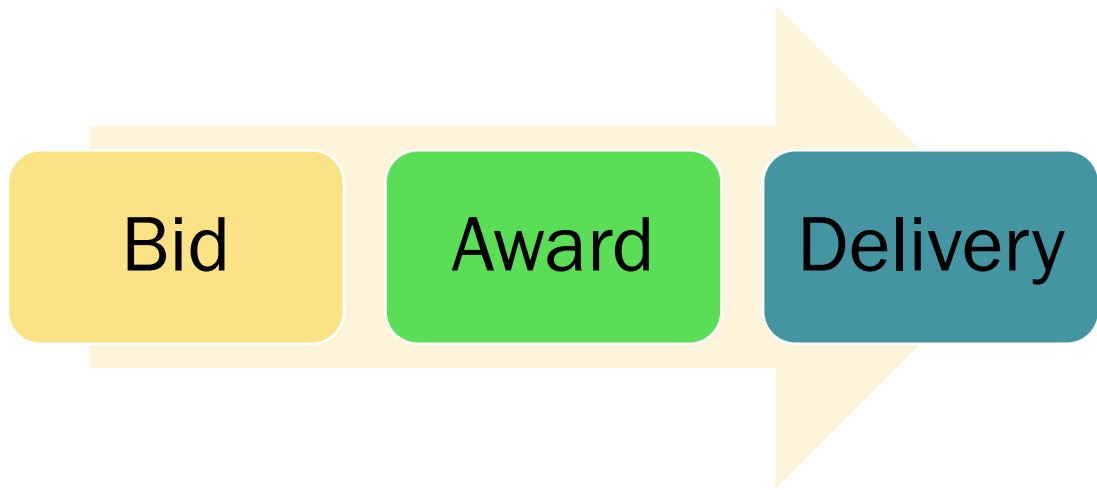
---

# Public Announcement of the Bid

- 
- ❖ Open and fair to everyone interested
  - ❖ Enough time for responding
  - ❖ Unreasonable response requirements
  - ❖ Go Electronic
  - ❖ What is your responsibility to the agreement?







- ❖ Does your bid give vendors enough time to respond?
- ❖ Do you allow time for questions?
- ❖ Do you give enough time after award to prepare for deliveries?
- ❖ Does your first order take into account production times



# Timelines





- ❖ All questions and answers go to all respondents
- ❖ Discuss “or equal” products
- ❖ Identify meetings for assessment of contract relationship
- ❖ BE FLEXIBLE – YOUR PROFIT MARGIN IS LOW

# Negotiations

---

# Ordering/Purchasing

- ❖ Talk about realistic timelines
- ❖ SOP for substitutions
- ❖ Identify special needs foods
- ❖ Identify special events
- ❖ Tracking USDA Foods drawdown
- ❖ Shorten payment timelines





- ❖ Timeframe for deliveries needs to be reasonable
- ❖ Employee ready to receive and store food properly
- ❖ Check for compromised foods
- ❖ Check invoice against bid pricing
- ❖ SOP for substitutions

# Receiving

---





- ❖ Who checks invoices?
- ❖ Establish vendor audit process
- ❖ Buy American documentation
- ❖ How many times substitutions are made

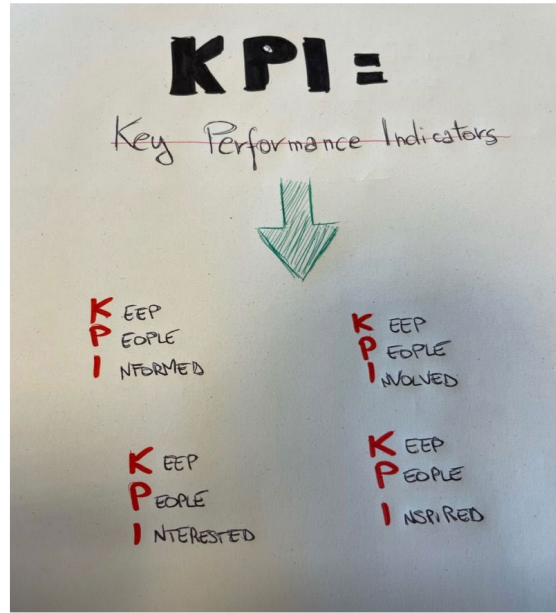
# Record Keeping

---

# Commitments

- ❖ You signed an agreement
- ❖ Vendors are running a business
- ❖ Many products are not saleable outside school market
- ❖ BUY WHAT YOU ORDERED
- ❖ Bid price increase when you leave too much behind





- ❖ Identify less popular items and make change in next procurement cycle
- ❖ Give vendor feedback on customer service
- ❖ Review vendor's ability to service the account
- ❖ Review specifications to see if you are getting exactly what you wanted. Revise as needed

# Review and Assess

---



- ❖ Your word is important
- ❖ Communication is key to everything
- ❖ People are paid based on performance
- ❖ Business deal, not a friendship deal

# Building Relationships

---



# Conquering Fear and Absurdity

- ❖ Ask questions
- ❖ Continue to learn
- ❖ Read the procurement regulations
- ❖ Look for absurdity in your bid requirements
- ❖ Talk to others in the district that play a roll in procurement
- ❖ Spend time on procurement process



- ❖ Good procurement takes commitment to a process
- ❖ Communication throughout the process is essential
- ❖ Think of the needs of each stakeholder in the process
- ❖ Make sure to drawdown full entitlement annually – dollars in you budget

- 
- ❖ Don't just purchase – procure your goods and services
  - ❖ All pieces of the puzzle need to fit together, meeting everyone's needs
  - ❖ Look in the mirror – what kind of a customer am I?

# Key Take Aways

# Thank you

---

Dr. Katie Wilson, SNS

Executive Director

Urban School Food Alliance

