



USDA Cooperative Agreement

*Procurement Practices in School Meals: Making
Real Change Work for Healthier Families*



YEAR ONE TECHNICAL REPORT October 1, 2023 - September 30, 2024

Table of Contents

Executive Summary.....	2
A Year in Review.....	2
Collaboration and Partnerships.....	2
Introduction.....	3
Objectives for Cooperative Agreement.....	3
Short-Term and Long-Term Goals.....	5
Snapshot of Deliverables.....	6
Meetings and Outcomes.....	7
Advisory Procurement Workgroup: <i>Identifying School Procurement Pain Points</i>	7
Survey Overview with the Harvard Kennedy School.....	9
2024 Virtual Meetings with Cooperative Agreement Subcommittees.....	9
Cooperative Agreement Subcommittees and Mapping Outcomes.....	10
Pain Point Matrix: <i>Connecting to the top 6 Procurement Pain Points</i>.....	10
Pain Point #3: Electronic Bid Process and Technology.....	11
A Closer Look at Pain Points #1 & #6: Research and Review of Procurement Methods..	11
Procurement Training Needs Survey.....	11
Investigative Procurement Research Project.....	11
Summary of Federal School Food Procurement Rules.....	12
Action Plan and Next Steps.....	12
Contributors.....	13
Tables.....	14
Appendices.....	22

1. EXECUTIVE SUMMARY

1.1. A Year in Review

This project seeks to improve procurement practices for districts of all sizes in urban and rural areas. Through the review and assessment of current rules, practices, and training materials, including the expertise of stakeholders involved all along the supply chain, this project will provide School Nutrition Leaders with easy-to-use procurement tools and a voice in the process. As the first year of this Cooperative Agreement comes to completion, all objectives are in progress. The deliverables highlighted in this report will demonstrate the complexity of this project, along with its many achievements during this first year. Both phase one and two of this Cooperative Agreement are now in progress, with phase three beginning in the second year of this project. The three phases of this project are as follows:

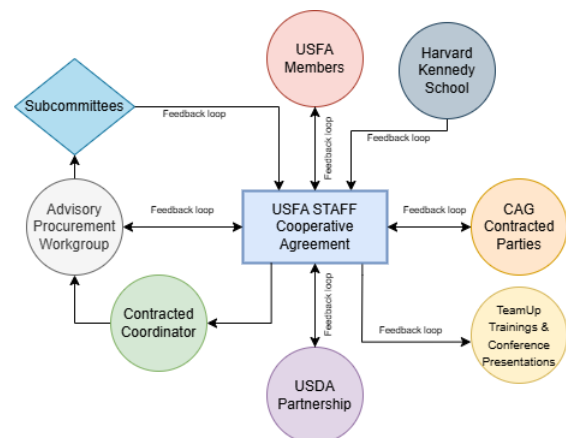
- I. Phase One: Investigative
 - a. Create an Advisory Procurement Workgroup of diverse stakeholders to speak into the work; Review procurement rules at federal, state, and local levels; Review procurement training available and identify gaps.
- II. Phase Two: Development
 - a. Develop a national bid template; Develop procurement training to address identified gaps; Conduct TeamUp trainings around the country relating to procurement; Develop a toolkit for hosting a local producer webinar; Produce webinars with school districts.
- III. Phase Three: Piloting Change
 - a. Conduct Pilots with districts, state agencies, and regional offices committed to trying new ways of procuring school food using the information gathered from the project; Prepare a proposal for a new school food procurement business plan to USDA/Congress.

As described in the previous quarterly report submissions, the biggest challenge throughout this first year was delays in contracting. The other delay this project has faced is with webinars for local producers. Through USFA's initial research and work, the number of resources and toolkits already in circulation was significant. USFA has dedicated time to understanding the current landscape of producer webinars and toolkits to highlight best practices with the goal of not reinventing the wheel. As the second year of this project commences, USFA will begin to host webinars for local producers, lead Team Up trainings across the country, begin bid template content pilots, facilitate the yearly in-person Advisory Procurement Workgroup meeting, and much more. All this work will continue to evolve and develop with the project's goal at the forefront, to improve procurement practices for districts of all sizes in urban, suburban, and rural areas.

1.2. COLLABORATION AND PARTNERSHIPS

Collaboration with diverse groups of stakeholders is critical to this Cooperative Agreement's success. One of the key collaborative relationships of this Cooperative Agreement is the Advisory Procurement Workgroup (APWG) which USFA's Senior Staff organized. This workgroup includes a diverse array of stakeholders: small, medium, and large district representation; state agency representatives; a buying cooperative director, United States Department of Agriculture (USDA) foods processors, a small processor that is challenged to get into the school marketplace, American Commodity Distribution Association (ACDA), Association of School Business Officials (ASBOINTl), School Nutrition Association (SNA) representatives, along with large and small distributors.

The third quarter of the Cooperative Agreement also features Subcommittees. The primary goal of these subcommittees is to represent their stakeholder group providing feedback on different elements of the project to ensure that all members of the school nutrition procurement and supply chain are well represented. USFA anticipates seeking project feedback from the subcommittees through email and online surveys. USFA Senior Staff has selected the following subcommittees:



- I. State Agency
- II. School Food Authorities
- III. SNA State Directors
- IV. Industry
- V. Urban School Food Alliance Members
- VI. Outside Stakeholders

Another key collaborative relationship is with the Harvard Kennedy School, Government Performance Lab (GPL). The GPL has begun significant work on the research for this project, reviewing procurement rules at federal, state, and local levels. The GPL has also worked with USFA to create the Procurement Needs Assessment Survey, which will be made public through all State Agencies once the USDA approves the survey. The results of both the research and survey will be made public during FY25 of the Cooperative Agreement and will guide future work on the project.

2. INTRODUCTION

2.1. FY24 COOPERATIVE AGREEMENT: *Objectives for the Cooperative Agreement*

The following objectives are in progress or completed for Year 1, 2024, of the Cooperative Agreement. Additional objectives and phases for the 2025-2026 Cooperative Agreement years will appear in subsequent technical reports.

Phase 1: Investigative Phase- Create an Advisory Procurement Work Group:

- I. Completed: Identify the 6 most critical challenges in school procurement. USFA continues to gather top procurement pain points at TeamUp trainings and presentations nationwide. The aim at collecting these continuously is to document themes, similarities, and differences in the top pain points identified.
- II. In Progress and Ongoing: Development of action plans to address critical challenges.

Phase 1: Investigative Phase- Reviewing Procurement Methods:

- I. Continuous: Collect training programs that are available.
- II. Continuous: Review training for relevance and ease of learning.
- III. Continuous: Identify specific topics needed to fill gaps for better procurement process.
- IV. In Progress: Identify federal procurement rules that are challenging industry to engage in school procurement and inhibiting districts from engaging with a broader pool of small, minority-owned producers or processors.
- V. In Progress: Collect and compare a sampling of state procurement rules, including further processing methods allowed for USDA foods, to identify the inconsistencies of rules and suggest consistency in various areas for food procurement.
- VI. In Progress: Collect and compare a sampling of local procurement rules to identify barriers at the local level for procuring school food in a cost-effective manner with local, community vendor partnerships in mind.

Phase 2: Development - Develop a Bid Template:

- I. In Progress: Develop information for an interactive bid template that assists in developing a more standardized procurement process in school nutrition.
- II. In Progress: Include tutorials, with simplified messaging, on a variety of procurement topics.
- III. Ready to Begin: Pilots of bid template content.
- IV. In Progress: The bid template content Pilot Districts for FY25 are as follows:
 - 1. St. Vrain School RE-1J, Colorado
 - 2. Orange County Public Schools, Florida

3. Valley Mills ISD, Texas

- V. In Progress: Include an ongoing specification catalog, created and maintained by USFA, with major food items from all food categories. USFA already has an interactive template for purchasing local produce.

Phase 2: Development - Conducting TeamUp Workshops with Procurement Trainers:

VI. In Progress: Conduct Team-Up/Procurement Training

- A. Southwest Region: Value-Based Procurement, Focusing on Quality, not Quantity TeamUp. Completed on April 19, 2024, 80 Attendees.¹

B. Northeast

Region:

Procurement

Success with

Forecasting

TeamUp,

Completed on

July 13, 2024,

43 Attendees.²

VII. In Progress: Regions that will be addressed in FY25:

A. Planned:

Midwest -

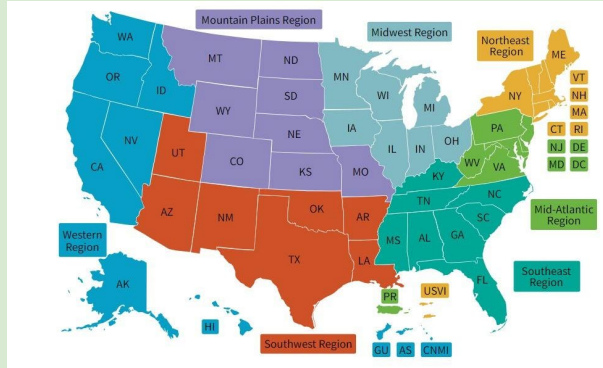
Minneapolis, MN TeamUp on Procurement 101. October 17, 2024.

- B. Planned: Southwest – Baton Rouge, LA TeamUp on Procurement 101. November 19, 2024.

- C. Planned: Southeast – Gatlinburg, TN – TeamUp on Value-Based Procurement, June 23, 2025.

VIII. In Progress: Conduct other training sessions based on training developed above, as requested/accepted by state agencies, national conference planners, or state associations, allowing participants to use templates, update their own bids with assistance suggesting improvements, and open discussions about solving challenges.

- A. April 21 - 24, 2024: ACDA presentations with Dr. Katie Wilson and Jill Kidd
1. "Viewing Procurement Through a New Lens" - Dr. Katie Wilson and Jill Kidd, RD, SNS, 70 Attendees.
 2. "Procurement 201" with Jill Kidd, RD, SNS, and Nancy Byrne of Affinity Sales, 60-70 Attendees.
- B. July 13, 2024, ANC Presentation, "Putting the Puzzle Pieces of Procurement Together," 34 Attendees.
- C. August 15, 2024, CESA Presentation on Puzzle Pieces of Procurement, 38 small rural school districts in attendance.
- D. August 13, 2024, "Equipment Procurement Regulations and Ethics" Presentation at Vulcan K-12 Academy, by Jill Kidd, 30 Attendees.
- E. September 11, 2024, "Puzzle Pieces of Value-Based Procurement," at Farm to School USDA Grantee Gathering, 21 Attendees.
- F. September 24, 2024, NASDA Presentation on the Cooperative Agreement and Webinars for Local Producers, 85 Attendees.



Phase 2: Development - Webinars for Local Producers:

¹ Expert panelist bios can be viewed on page 23.

² Expert panelist bios can be viewed on page 30.

IX.	In Progress: Identify a variety of small, minority producer organizations that can assist in developing the webinar content and communicating access to the webinars to their constituent base.
X.	In Progress: Create producer webinars including building partnerships with other organizations that can assist the producers with engaging in school procurement (such as GAP certification).
XI.	Producer Webinars in Progress: Ogalala Commons (Southwest Region), Hmong Farmers (Midwest Region)
Phase 3: Piloting Change - Objectives for Conducting Pilots (FY25/26):	
I.	Not Started: Identify ideas and practices, from all stakeholders in the system, identified throughout this Cooperative Agreement, which could make for a more cohesive, efficient procurement system for all involved.
II.	Not Started: Select 4-5 committed districts, with USDA's guidance and USFA's technical support, to implement ideas from this Cooperative Agreement, using the tools and training identified as best practice, to try a new way of doing business for one year.

2.2. SHORT TERM & LONG-TERM GOALS: *Cooperative Agreement 2024 Grant Year*

Short Term Goals	Long Term Goals
Establishing the Advisory Procurement Workgroup and subcommittee selection. (Completed)	Working to identify specific issues in school food procurement that can be catalysts to overall change. (Continuous)
Identifying the top 6 pain points for school food procurement. (Completed)	Developing a plan of action based on the top 6 pain points to include a recommended set of training materials available or redeveloped on specific topics in procurement. (In Progress/Continuous)
Developing scopes of work for the research, training, and different aspects of contracted work for this grant. (Completed)	Developing research and surveys associated with Phase 2 of the Cooperative Agreement. (In Progress)
Announcing the creation of the Cooperative Agreement throughout USFA networks to build awareness of this project and its purpose. (Completed)	Developing content for a new universal bid template for school food procurement. (In Progress)
Identifying school regions for bid template pilots in alignment with the Cooperative Agreement. (Completed)	Utilizing the Advisory Procurement Workgroup to share their feedback on project progress. (Continuous)
Facilitating TeamUps, in collaboration with state departments of education, in all USDA Regions. (In Progress/Continuous)	Developing webinars for local producers and a list identifying local producer organizations (In Progress).

2.3. SNAPSHOT OF DELIVERABLES: *October 1, 2023 - September 30, 2024*

The Urban School Food Alliance (USFA) has completed Year One of the Cooperative Agreement. During the four quarters of this first year, USFA completed a series of deliverables associated with project goals and objectives. The completed Cooperative Agreement Deliverables include but are not limited to, the following:

- I. Development of the Cooperative Agreement grant overview.
- II. Development of the content for public relations and communications about the Cooperative Agreement.
- III. Establishment of the Advisory Procurement Workgroup membership list.
- IV. Creation and presentation of a PowerPoint about the Cooperative Agreement.
- V. Creation of a final procurement assessment tool to share widely across USFA networks.
- VI. Completion of the First Annual in-person Advisory Procurement Workgroup event.
- VII. Objective Establishment of the Top 6 Pain Points in School Food Procurement.
- VIII. USFA Senior staff established a date for the initial Advisory Procurement Workgroup (APW) gathering and set the contract with the hotel.
- IX. USFA staff confirmed the hotel/dates to be shared with staff and APW members.
- X. USFA hired a consultant to manage the work of the APW.
- XI. USFA hired the Cooperative Agreement Administrator.
- XII. Creation of the agenda for the APW event.
- XIII. USFA invited members of the APW to the initial in-person meeting on February 20-22, 2024.
- XIV. USFA hosted and completed the first in-person meeting for the Advisory Procurement Workgroup.
- XV. As a part of Q2/3 and after the first in-person meeting of the Workgroup, USFA identified subcommittees that will include other participants who will provide feedback as needed.
- XVI. Completion of Scope of Works for Research and Survey development for Contracted parties.
- XVII. USFA completed the new Cooperative Agreement Webpage.
- XVIII. Completion of the Advisory Procurement Workgroup Meeting Summary of the February event.
- XIX. Establishment of the initial subcommittees for the Cooperative Agreement.
- XX. April 19, 2024, TeamUp in Sandy, Utah with the focus of “Value-Based Procurement Practices: Focusing on Quality, not Quantity,” with a total of 80 participants.³
- XXI. Subcommittee Overview Virtual Meetings held June 25th and 27th, 2024, for State Agencies and School Food Authorities, 53 attendee’s total.
- XXII. July 13, 2024, [TeamUp for Forecasting Success ANC](#), 43 Attendees.⁴
- XXIII. July 14, 2024, [ANC Putting the Puzzle Pieces of Procurement Together](#), 34 Attendees.
- XXIV. Harvard Kennedy School, Government Performance Lab begins work on research and survey development ahead of contract signing.
- XXV. July 15, 2024, In-person Bid Template Development Cooperative Agreement meeting with Keri Warnick, Multi Region 10 Co-op, and Ben Thomas, Shared Plate Strategies.
- XXVI. July 10, 2024, Webinars for Local Producers: Local producer organization list development.
- XXVII. July 23, 2024, Cooperative Agreement Pain Point Matrix development.
- XXVIII. August 1, 2024, Pain Point Matrix complete.⁵
- XXIX. August 7, 2024, Advisory Procurement Workgroup Virtual Meeting.
 - A. Attendance: 76% of members were in attendance for the virtual meeting.
 - B. Pain Point #2 Deep dive, reframing the pain point.
- XXX. August 13, 2024, “Equipment Procurement Regulations and Ethics” Presentation at Vulcan K-12 Academy, by Jill Kidd, 30 Attendees.
- XXXI. August 15, 2024, “Putting the Puzzle Pieces of Procurement Together” CESA Presentation, by Dr. Katie Wilson. 38 small and rural school districts in attendance.
 - A. Top pain points shared by school districts:
 1. Availability of product/Out of stock
 2. Lack of easy-to-access/effective training

³ Please see page 22 for the evaluation and report from the TeamUp Utah.

⁴ Please refer to page 30 for evaluations from TeamUp ANC.

⁵ Please see page 11 for the full Pain Point matrix.

3. How to forecast properly/accurately
 4. The time it takes to bid/ requiring 3 bids/lack of staff/finding vendors to bid and documenting why you don't have 3 bids
 5. Taste testing is time-consuming and not reliable
 6. Regulations/crediting in a prescriptive
 7. Environment/bookkeeping requirements
- XXXII. August 21, 2024, [Virtual Subcommittee Cooperative Agreement Overview Meeting: Outside Stakeholder/Industry](#), 25 attendees.
- XXXIII. Bi-weekly Virtual Meetings with Harvard Kennedy School, Government Performance Lab to discuss contract status, survey development, and research.
- XXXIV. August 24, 2024, Harvard Research and Survey Contract Secured and Signed.
- XXXV. Webinars for Local Producers: Local producer organization list initial draft in progress.
- XXXVI. September 1, 2024, Bid Template Content Development Permission was granted to USFA and Keri Warnick, Program Coordinator of Multi-Region Purchasing Cooperative, Region 10 Education Service Center.
- XXXVII. September 3, 2024, Webinars for local producers section created on the website, "Bringing the Farm to School Producer Toolkit" posted publicly on the [Cooperative Agreement webpage](#).
- XXXVIII. September 11, 2024, ["Puzzle Pieces for Value-Based Procurement,"](#) Omaha, NE, 21 Attendees.
- XXXIX. September 13, 2024, Webinars for Local Producers: USFA, University of Wisconsin, and Hmong Farmers Virtual Meeting to develop Webinar for Local Producers, Wisconsin.
- XL. Draft Webinars for Local Producers overview of procurement one-pager for Hmong farmers⁶ completed, September 2024.
- XLI. September 17-18, 2024, USFA Team In-Person meeting in Pueblo, CO, Cooperative Agreement Action planning for Year 2, FY25.
- XLII. September 18, 2024, Cooperative Agreement Virtual Procurement Needs Assessment Survey Overview with project subcommittees, 33 Attendees, 49% of registered attendees. Harvard Kennedy School and USFA co-hosted the Procurement Survey walkthrough with State Agency representatives, School Food Authority representatives, and Advisory Procurement Workgroup members associated with State Agencies and School Food Authorities.
- XLIII. September 24, 2024, Cooperative Agreement Overview Presentation at NASDA, Indianapolis, IN, 85 Attendees.
- XLIV. Advisory Procurement Workgroup changes to membership due to Keri Warnick developing bid template content, and Elena Hoffnagle working with the Harvard Kennedy School research component.
- XLV. USFA identified districts for piloting of the bid template content.
- A. St. Vrain School RE-1J, Colorado
 - B. Orange County Public Schools, Florida
 - C. Valley Mills ISD, Texas

3. MEETINGS AND OUTCOMES

3.1. ADVISORY PROCUREMENT WORKGROUP INAUGURAL MEETING: *Identifying School Procurement Pain Points*

The Advisory Procurement Workgroup (APWG)⁷ was established in December of 2023 and began its work with a two-day in-person meeting from February 21-22, 2024. During this inaugural APWG meeting, each Workgroup member was instructed⁸ to identify six procurement-specific pain points; each pain point was written on separate note sheets and placed on the whiteboards. This exercise generated 109 responses. During a break in the meeting, USFA staff sorted the 109 Pain Points into 14 broad categories; many of the pain points applied to multiple categories. Each table was asked to determine their top six Pain Points,

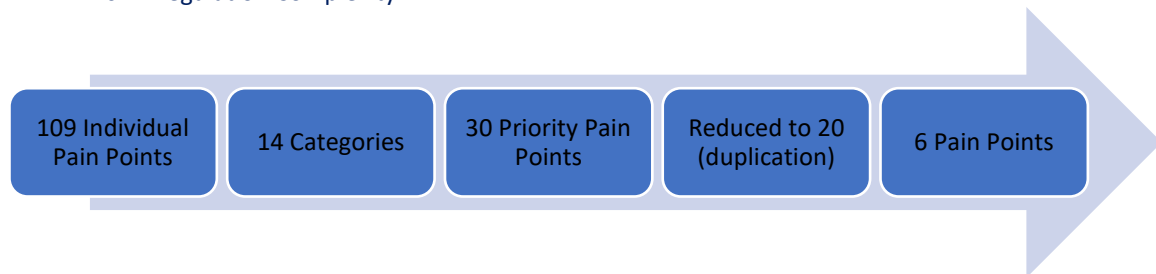
⁶ Please see page 29, Hmong Farmers Webinar document, for full information.

⁷ Please see page 14 for APWG member list.

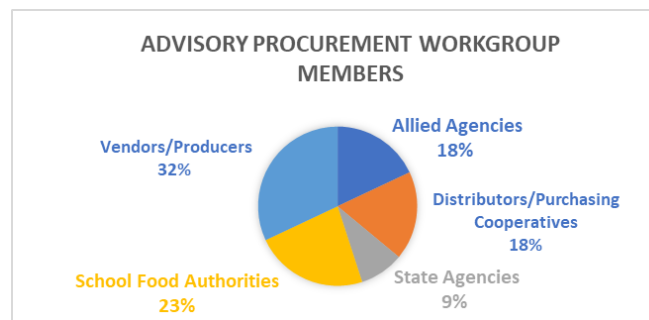
⁸ Please see page 24, for further details of voting.

resulting in a reduction of Pain Points to 30 which was further reduced to 20 due to duplicative priorities. Each member was given dots to vote on the top procurement issues resulting in the top six procurement Pain Points:

1. Lack of State/federal/local alignment
2. School districts must compete in the food service sector
3. Electronic bid process/technology
4. Training
5. Forecasting
6. Regulation Complexity



Since the inaugural meeting and voting on the top 6 procurement pain points, there has been ample engagement from the Workgroup members. In preparation for the initial meeting, over 50% of Workgroup members shared resources for the Workgroup to view and utilize. Since the February meeting, an additional 30% of Workgroup members have reached out with further items to share with the project team and other workgroup members.



3.2. ADVISORY PROCUREMENT WORKGROUP: *August 2024 Virtual Meeting*

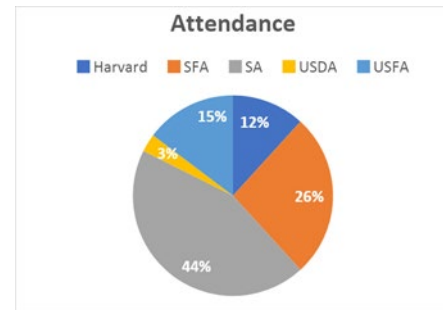
The second meeting of the APWG was on August 7, 2024; 76% of the APW members were able to attend as well as 6 USFA staff, 5 USDA staff, and 1 USFA contractor. This meeting was to review progress on the Cooperative Agreement since the February in-person meeting, discuss upcoming milestones and deliverables, share project timelines, and provide an opportunity regarding Pain Point #2.

- The meeting covered the following topics:
 - Updates were provided on the 60-Day Technical Report and Cooperative Agreement.
 - TeamUp for Procurement trainings completed and in progress for FY25. It was also noted that additional TeamUp for Procurement training opportunities may be scheduled; members were advised to request TeamUp sessions through the USFA Cooperative Agreement website message box.
 - Analysis of Procurement Rules & Procurement Training updates with the Harvard Kennedy School on the research components of this grant. The Harvard Kennedy School is developing a survey for State Agencies to distribute to SFAs based on the work conducted by the APW in February establishing the 6 Pain Points. This will be going out to state agencies for distribution to School Food Authorities and to School Business Officials through the School Business Officials state presidents.

- Meeting outcome: Pain Point #2: Refinement⁹
 - The APWG worked in breakout rooms to better define Pain Point #2, originally stated as: “School Districts must compete in the food service sector,” revised in February to “Create a best practice school nutrition procurement model to make SFAs a better customer,” further revised at this meeting to read: “Identify a best practice school nutrition procurement model.”

3.3. SURVEY OVERVIEW: APWG and Harvard Kennedy School, Government Performance Lab: September 18, 2024

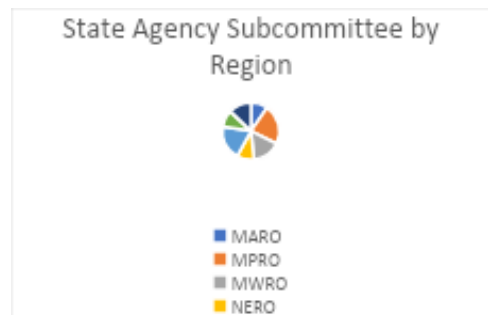
On September 18, 2024, APWG members and Subcommittee representatives from State Agencies or School Food Authorities were invited to attend a meeting with the Harvard Kennedy School, Government Performance Lab (GPL) to discuss the procurement survey in development. This survey will gather information on obstacles in procurement and procurement training. All Attendees were allowed an opportunity to provide feedback on the survey and its dissemination which will be submitted to USDA for approval before distribution.



3.4. 2024 Virtual Meetings with Cooperative Agreement Subcommittees

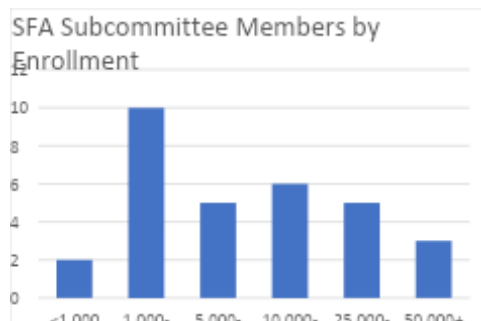
The primary goal of these subcommittees is to represent their stakeholder group and provide feedback on different elements of the project to ensure that all members of the school nutrition procurement and supply chain are well represented. USFA anticipates seeking project feedback from the subcommittees through email and online surveys. USFA Senior Staff has selected the following subcommittees:

- I. State Agency
- II. School Food Authorities
- III. SNA State Directors
- IV. Industry
- V. Urban School Food Alliance Members
- VI. Outside Stakeholders



3.4.1. State Agency CAG Overview: June 25, 2024

All state agencies were invited to participate in the State Agency Subcommittee; 35 members representing 31 state agencies are currently on this subcommittee, and 66% of the subcommittee could attend the June 25, 2024, overview meeting. This subcommittee represents all USDA FNS regions. A full list of members from June 2024 can be found on page 18. This list remains open as additional members join this work.

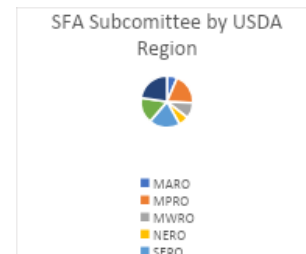


3.4.2. School Food Authorities CAG Overview: March 4, 2024, and June 27, 2024

The School Food Authority Subcommittee has transitioned from the initial subcommittee initiated by the state SNA presidents who were provided an overview of the Cooperative Agreement by USDA at the School Nutrition Association Legislative Action Conference on March 4, 2024. The invitation to attend was extended to 40 state presidents with 30 attending; a list of attendees can be found on Table 9, page 38. This core group of School Food Authority representatives was asked to transition to the SFA Subcommittee

⁹ Please visit page 20 for full details on pain point #2 refinement.

while accepting new members to this emerging subcommittee. As this is an open subcommittee, the attendance fluctuates per virtual meeting. All those in USFA's SFA lists will receive any request for feedback that is sent out. The current confirmed membership is 31 persons representing school districts in 24 states across all USDA FNS regions. A full list of members can be found on page 17.



3.4.3. Industry and Outside Stakeholders CAG Overview: August 21, 2024

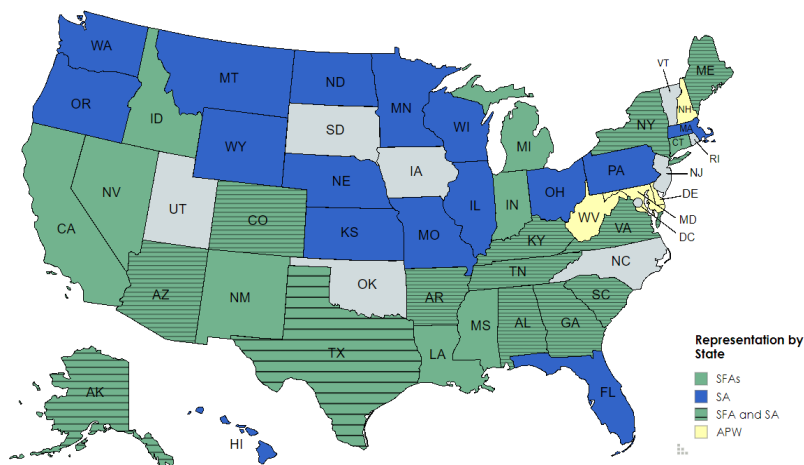
The Industry Subcommittee has a current membership of 28 members representing 24 companies in the K12 foodservice market and is comprised primarily of food processors. This subcommittee met virtually to review the Cooperative Agreement on August 21, 2024, with 67% attending; please see page 19 for a full list of subcommittee members. The Outside Stakeholders Subcommittee includes nonprofit organizations and educational institutions interested in the K12 foodservice market; the current membership is 7 members with 88% attending the virtual overview meeting.

3.4.4. Virtual Membership Meetings: USFA Member Districts

The 19 Urban School Food Alliance member agencies represent 6462 schools throughout the United States. Updates and feedback on the Cooperative Agreement are provided through membership meetings. A full list of member agencies can be found on page 15.

3.5. CAG Subcommittees and Mapping Outcomes:

The Industry and Outside Stakeholders subcommittees were selected by USFA Senior Staff, with additional members being added as they are identified. The State Agency and School Food Authority Subcommittees are open to all State Agency Directors and School Business Officials. These committees remain open, to allow for all individuals interested in this work the opportunity to provide feedback. USFA has found this to be the best way to make the feedback loop for this project inclusive and honor the complex schedules and workloads of all individuals working within the school food sector. The map above displays the state involvement and representation in all virtual meetings for Cooperative Agreement feedback for Year.



4. PAIN POINT MATRIX: Connecting to the top 6 Procurement Pain Points

Since the inaugural APWG meeting in February of 2024, USFA has built a matrix displaying how the Cooperative Agreement addresses the top 6 pain points of school food procurement. As FY25 begins, there will be additions to this matrix highlighted in purple. The diagram in this section is a visual representation of the action plan for the Cooperative Agreement and a larger format of this matrix can be viewed on page 31. The following list details what is shown in the diagram and how USFA is currently working to connect the work of this Cooperative Agreement to each Pain Point as identified by the APWG:

1. Lack of State/federal/local alignment
 - a. Advisory Procurement Workgroup (APWG)
 - b. Subcommittees
 - c. Harvard Kennedy School, Government Performance Lab Research and Survey

2. School districts must compete in the food service sector
 - a. APWG deep dive on August 7, 2024
 - b. USFA created tools and presentations:
 - i. FY24 creation of the procurement self-assessment tool
 - ii. April 2024, ACDA "Procurement 201" Presentation
 - iii. September 2024, USFA Value-Based Procurement Farm to School Grantee Gathering

3. Electronic bid process/technology

- a. Universal Bid Template content development
- b. Universal Bid Template school district Pilots (rural, suburban, urban)

4. Training

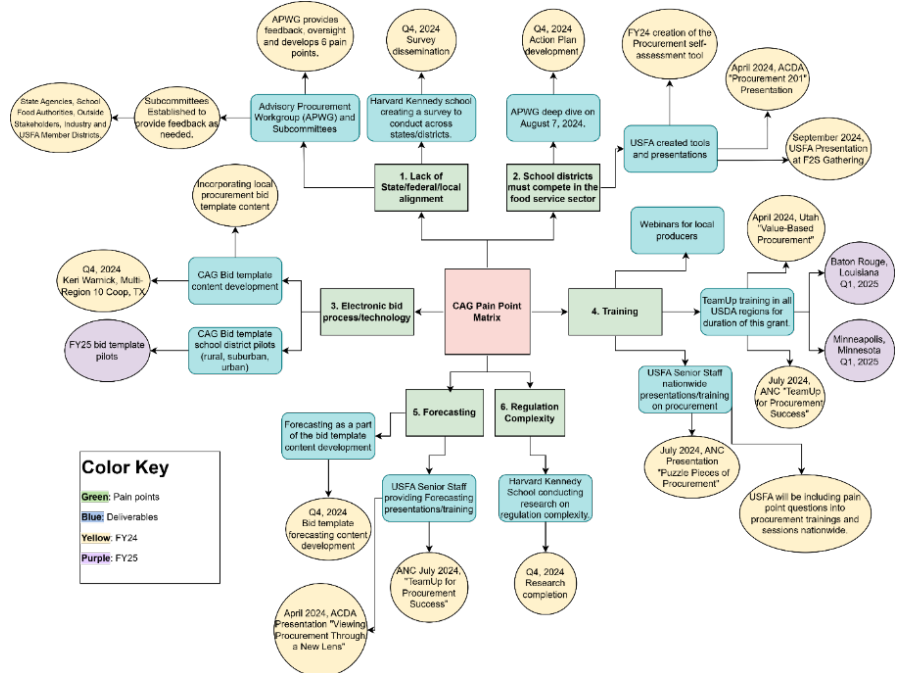
- a. Webinars for local producers
- b. TeamUp training in each USDA region
- c. USFA nationwide procurement training and presentations

5. Forecasting

- a. Forecasting as a part of the bid template content development
- b. USFA procurement forecasting training.

6. Regulation complexity

- a. Harvard Kennedy School, Government Performance Lab research



4.1. Pain Point #3: Electronic Bid Process and Technology

The Cooperative Agreement's objective to develop content for a Universal Bid Template aligns with the third pain point developed by the Advisory Procurement Workgroup. The third pain point is the Electronic Bid Process and Technology. USFA has contracted to work with Keri Warnick, Coordinator, Multi Region Cooperative in Texas, to develop the content for this universal bid template. Along with the content, the bid template content pilot districts that have been selected are as follows:

- St. Vrain School RE-1J, Colorado
- Orange County Public Schools, Florida
- Valley Mills ISD, Texas

4.2. A Closer Look at Pain Points #1 & #6: Research and Review of Procurement Methods

Contributed by the Harvard Kennedy School, Government Performance Lab (GPL)

4.2.1. Procurement Training Needs Survey:

The Harvard Kennedy School Government Performance Lab (GPL) has developed a survey to be sent to school food directors and school district business officials nationwide. The survey, designed with feedback from USFA subcommittee members, asks respondents to name the top challenges they face in school food procurement, as well as what topics and methods of training would best reach them. The survey will be distributed digitally upon approval from the USDA with results available in 2025. The GPL has set a goal of at least 50 responses per USDA region.

4.2.2. Investigative Procurement Research Project:

The Harvard Kennedy School Government Performance Lab (GPL) continues researching the regulatory environment that shapes school food procurement. The GPL has summarized core federal rules and is researching the state websites of 21 states (3 in each USDA region). From this initial scan, several initial insights have emerged. Once this scan is complete, the GPL will compile a technical report with this information and produce more accessible documents for practical use.

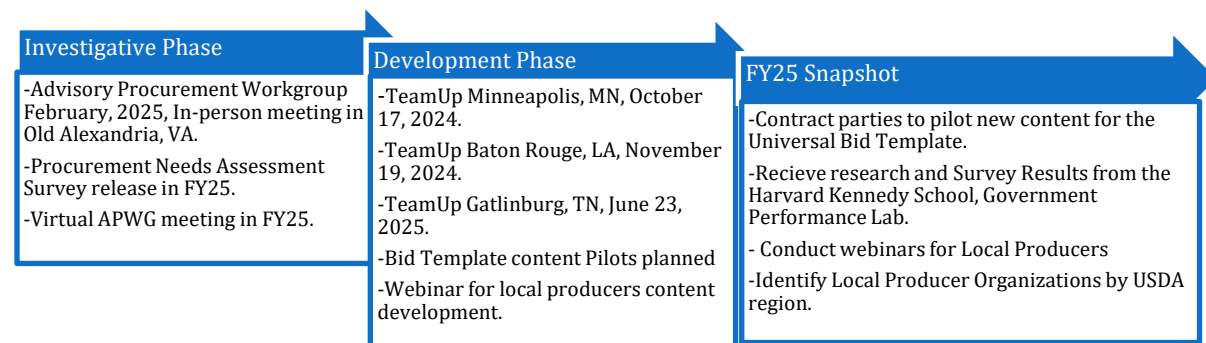
4.2.3. Summary of Federal School Food Procurement Rules Preliminary Findings:

As recipients of federal funding, School Food Authorities (SFAs) must follow [Part 200 of Title 2](#) of the U.S. Code of Regulations titled, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. Additional federal procurement requirements for the National School Lunch Program are published in [Part 210 of Title 7](#) of the U.S. Code of Regulations, titled National School Lunch Program, followed by sections for the School Breakfast Program ([Part 220](#)), Summer Food Service Program ([Part 225](#)), and food distribution such as USDA Foods ([Part 250-254](#)). Many of the regulations for the National School Lunch Program are repeated for the other child nutrition programs; therefore, this summary focuses solely on the National School Lunch Program regulations. The National School Lunch Program guidance also mirrors what Part 200 of Title 2 establishes regarding procurement for public entities. There are a few minor differences between states, highlighted below, regarding geographic preferences (*Section V of outline*) and the use of vendor-supplied assistance for writing specifications.

Decisions that are left open to state interpretation in the federal procurement rules, resulting in different state policies:

- [Micro-purchasing] Distribution of micro purchases: “To the maximum extent practicable, the non-Federal entity should distribute micro-purchases equitably among qualified suppliers.” There is no federal rule about the number of micro purchases that can be made with a single supplier.
- [Small/informal purchasing] Number and format of quotes needed for small purchases: “...price or rate quotations must be obtained from an adequate number of qualified sources as determined appropriate by the non-Federal entity.” There is no federal rule on how many quotes must be obtained or in what format (verbal vs. Written), resulting in different state rules about this.
- [Sealed bids] Number of bidders and days that a bid must be available: “Bids must be solicited from an adequate number of qualified sources, providing them sufficient response time prior to the date set for opening the bids...” There is no required number of bidders or minimum days that a bid must be advertised before opening, resulting in different state requirements.

5. ACTION PLAN AND NEXT STEPS



The above graphic showcases a snapshot of the upcoming next steps for the Cooperative Agreement. The Action plan for this Cooperative Agreement is in constant development for the duration of this grant. USFA’s Pain Point Matrix is the visual representation of the action plan for the Cooperative Agreement and it will continue to expand as the work progresses.

Contributors

The following is a list of contributors for this Technical Report and their respective areas of work for the Cooperative Agreement:

- Dr. Katie Wilson, Executive Director, Urban School Food Alliance
- Jill Kidd, Director of Procurement and Business Innovation Initiatives, Urban School Food Alliance
- Jeremy West, CFO, Urban School Food Alliance
- Dottie Arnold, Cooperative Agreement Administrator, Urban School Food Alliance
- Jo Dawson, Advisory Procurement Workgroup Coordinator, Contractor
- Harvard Kennedy School, Government Performance Lab:
 - Laura Merryfield
 - Pamela Portocarrero
 - Elena Hoffnagle
- Keri Warnick, Coordinator, Multi Region Cooperative, TX, Universal Bid Template Contractor.

TABLE 1: USFA Advisory Procurement Work Group Members		
Member	Affiliation	Representing
Mike Birkmeyer	Maryland State Department of Education	State Agency/Great Customer Service
Laura Bruno, RD, SNS	Buena Vista Foods	Vendor: K12, USDA Foods Processing, Commercial
Deborah Cameron	Colorado Department of Human Services	ACDA
Moss Crutchfield, CEC, SNS	Epping School District, New Hampshire	School Food Authority/Small school district NH/Universal Free Meals
Christopher Derico, SNS	Barbour County Schools, West Virginia	School Food Authority/School Nutrition Association President
Vanessa Hayes	Tift County Schools, Alabama	School Food Authority, medium size
Brian Hofmeier	JTM Food Group	Vendor: K12, USDA Foods Processing, Commercial
Lynelle Johnson, LRD, SNS	North Dakota Department of Public Instruction	State Agency/small, rural schools
Steven Jones	Future Harvest Founder	Working with small producers
Glennis Kitzrow	IFD Foodservice Distributor	Regional Distributor/regional/medium
Everett Kuglar	Rich Chicks	Vendor: K12, USDA Foods Processing, Commercial
Sunil Kumar	The Amazing Chickpea	Small vendor/Getting into the School Procurement System
Cliff Meyers	ClearVu	GPO: Commercial and USDA Foods
Nicole Nicoloff	Sysco	Distribution: Large/National
Josh Nunnally	Tennessee Department of Education	State Agency/Procurement
Rob Rosado	International Dairy Foods Association	Dairy Industry
Manish Singh	LA Unified School District	School Food Authority, large; Urban School Food Alliance
<i>*Keri Warnick</i>	<i>Multi-Region Purchasing Cooperative/Region 10</i>	<i>Food Purchasing Cooperative</i>
Bertrand Weber	Minneapolis Public Schools, Minnesota	School Food Authority, medium/engaged in local procurement
<i>*Elena Hoffnagle</i>	<i>Harvard University</i>	<i>Government Performance Lab</i>
Elleka Yost sitting in for Christina Berta MBA, SFO	ASBO International/Hanover County Public Schools	Association of School Business Officials
Alex Dinovo	DNO Produce	Produce Industry

** Elena Hoffnagle was on the Advisory Procurement Workgroup until USFA secured a contract with Harvard University Government Performance Lab as a part of the Cooperative Agreement.*

** Keri Warnick was on the Advisory Procurement Workgroup until USFA secured a contract with Keri for Bid Template Content Development work as a part of the Cooperative Agreement.*

Table 2: Subcommittee: Urban School Food Alliance Member Agencies

Austin Independent School District
Baltimore City Public Schools
Boston Public Schools
Brevard County Schools
Chicago Public Schools
Dallas Independent School District
Fairfax County Public Schools
Gwinnett County Public Schools
Los Angeles Unified School District
Memphis-Shelby County Schools
Miami-Dade County Public Schools
New York City Department of Education
North East Independent School District
Orange County Public Schools
The School District of Palm Beach County
The School District of Philadelphia
Portland Public Schools
San Diego Unified School District
Seattle Public Schools

Table 3: 2023-2024 LAC SNA State Presidents Meeting Attendees

Emma Hallman	Haleyville City SD	CNP Director	AL
Amanda West	Monticello SD	CN Director	AR
Patti Bilbrey	Scottsdale USD	Director, Nutrition Services	AZ
Carrie Bogdanovich	Burbank USD	Director of Nutrition Services	CA
Sarah Blaida (Grunow)	Adams 12 Five Star Schools	Nutrition Operations Manager	CO
Kristina Roberge	Groton SD	Food Service Coordinator	CT
Lynn Geist	Pinellas County SD	Food Service Director, Retired	FL
Cathy Johnson	Richmond County SD	Nutrition Director	GA
Coni Dobbels	Davenport Community Schools	Director	IA
Kathryn Rogers	Minidoka County Joint SD 331	Director	ID
Beth MacKenna	Rock Island - Milan SD 41	SN Director	IL
Courtney FitzSimons, MA, RD, SNS	West Lafayette Community School Corporation	Food Service Director	IN
Amber Workman	Meadows ES	Food Services Manager	KS
Steve Abbott	Campbell County SD	Food Service Director	KY
Jenny Welch	Avoyelles Parish School Board	Food Service Supervisor	LA
Maura Crowley	Franklin PS	Asst. Food Service Director	MA
Cody Wilt	Garrett County PS	Assistant Manager of FNS	MD
Alisa Roman	Lewiston PS	Director of Nutrition & Transportation	ME
Daniel Connors	Chippewa Valley Schools	Director of Food and Nutrition	MI
Michele Hawkinson	Tracy Sec.	Food Service Manager	MN
Rick Kenkel	Joplin Schools	SN Director	MO
Ashley Harris, MS, RD	Jackson County SD	Director of Child Nutrition	MS
Tammy Wham	Ennis K-12 Schools	Kitchen Manager	MT
Janet Johnson	NCDPI	Assistant Director	NC
Gina Giovannoni	Bismarck 1 PS	CN Purchasing Coordinator	ND
Brock Kaupp	Keya Paha County HS	Kitchen Manager/Food service director	NE
Toni Bowman RD	Pomptonian Food Service	Corporate Dietitian	NJ
Rachel Roybal-Rogers	Mora ISD	SN Director	NM
Elizabeth Martinez	Carson City SD	Director of Nutritional Services	NV
Naim Walcott	Westhampton Beach SHS	School Food Service Director	NY
Ashley Morena	Canton Local SD	Food Service Director	OH
David Ludwig	Norristown Area SD	Director of Food Services	PA
Jenaffer Stevenson	Pickens County SD	Director	SC
Vonda Bradford	Franklin County SD	SNP Director	TN
Doug Massey	Klein ISD	Executive Director - Facility & School Services	TX
Casey Kress	Tooele SD	SN Director	UT
Larry Wade	Chesapeake City PS	Director of School Nutrition Services	VA
Karen Brown	Franklin Pierce SD	Director of Child Nutrition	WA
Bobbie Guyette	New Richmond SD	Director	WI
Teresa Baker	Raleigh County SD	Child Nutrition Director	WV

Table 4: School Food Authorities Subcommittee

Member	State	District
Carlee McIntosh	Alaska	Petersburg SD
Emma Hallman	Alabama	Haleyville City SD
Patti Bilbrey	Arizona	Scottsdale USD
Amanda West	Arkansas	Monticello SD
Laura Jennings	Arkansas	Lake Hamilton SD
Carrie Bogdanovich	California	Burbank USD
Joe Cook	California	Antelope Valley Union HSD
Richard Andrews	California	Kern HSD
Sarah Blaida (Grunow)	Colorado	Adams 12 Five Star Schools
Cossette Katie	Colorado	St Vrain Valley SD
Monica Deines	Colorado	District 49
SC Solomon	Colorado	Aurora Public Schools
Kristina Roberge	Connecticut	Groton SD
Rae Hollenbeck	Florida	POWER Buying Group
Cathy Johnson	Georgia	Richmond County SD
Kathryn Rogers	Idaho	Minidoka County Joint SD
Courtney FitzSimons	Indiana	West Lafayette Community Schools
Coni Dobbels	Iowa	Davenport Community Schools
Steve Abbott	Kentucky	Campbell County SD
Jenny Welch	Louisiana	Avoyelles Parish School Board
Alisa Roman	Maine	Lewiston PS
Daniel Connors	Michigan	Chippewa Valley Schools
Ashley Harris	Mississippi	Jackson County SD
Elizabeth Martinez	Nevada	Carson City SD
Rachel Roybal-Rogers	New Mexico	Mora ISD
Allesandro Palumbo	New York	Farmingdale UFSD
Jenaffer Stevenson	South Carolina	Pickens County SD
Vonda Bradford	Tennessee	Franklin County SD
Doug Massey	Texas	Klein ISD
Larry Wade	Virginia	Chesapeake City SD
Patrick McCarty	Virginia	Hanover County PS
Karen Brown	Washington	Franklin Pierce SD

TABLE 5: State Agency Subcommittee Members

Member	State Agency
Angelice Lowe	Alabama
Gavin Northey	Alaska
Mark Frantz	Arizona
Krista Jackson	Arkansas
Diane Matthews	Colorado
Aimee Beam, RD, LDN	Delaware
Susannah “Quinn” Skinner	Florida
Holly Thaw	Georgia
Sharlene Wong	Hawaii
Christina Smith	Illinois
Cynthia Harris	Indiana
Kala Shipley	Iowa
Keerti Patel	Iowa
Kelly Chaney	Kansas
Robert Dillman	Kansas
Lauren E. Moore	Kentucky
Jane McLucas	Maine
Laura Benavitez	Massachusetts
Melissa Elder	Minnesota
Barbara Shaw	Missouri
Emily Madsen	Montana
Kayte Partch	Nebraska
Kimberly Vumbaco	New York
Melissa Anderson	North Dakota
Brigette Hires	Ohio
Damasita Sanchez	Oregon
Richard Williams	Oregon
Vonda Cooke	Pennsylvania
Ellen Mason	South Carolina
Daniel Ashley	South Carolina
Josh Nunnally	Tennessee
Lena Wilson	Texas
Dr. Sandra Curwood	Virginia
Randy Jones	Wisconsin

Table 6: Industry Members Subcommittee

Industry	Company
Scott Brown	1 World Sync
Lincoln Yee	Asian Food Solutions
Ashyton Higler	Asian Food Solutions
Dorothy Cole	Gordons Food Service
Tom Farris	ES Foods
Audra Jansen	Farm to Plate
Bill Ritcey	Farm to Plate
Andrew Marshall	IFPA
Rich Hudgins	California Peach Board
Jennifer Armstrong	DonLee Farms
Carole Gnan	Hormel
Taylor Parkhurst	Hormel
Carole Erb	JTM
Jodi Batten	Red Gold
Anita Papke	Simplot
Stephanie Ewing	Gold Star
Sean Lear	Gold Star
Neil Kinney	Rich Chicks
Sean Steichen	Diversified Foods
Doug Adams	Prime Consulting.biz
Dan Southard	MCI Los Cabos
Kevin Crampton	HPS
John Surdy	Nardone Brothers Baking Co. Inc.
Robin Bowman	CORE Foodservice
Mike Piazza	S A Piazza & Assoc
Quincy Wiley	S A Piazza & Assoc
Dorie Pullen	Dominoes

Table 7: Outside Stakeholders Subcommittee


Mark Tadros	Aziz Farms/The Packhouse at Aziz Farms
Jeremy Everett	Baylor Collaborative on Hunger and Poverty
John Puder	Baylor University: Hunger Outreach Empowerment Program
Elijah Tanner	Baylor Collaborative on Hunger and Poverty
Miquel Villarreal	National Farm to School Network
Becky Garrison	National Association of State Departments of Agriculture
Michael Francis	SNA/Spring Branch ISD


Table 8: Virtual APW Meeting Feedback on Pain Point #2

Room	Feedback
1	The time is now to get people to make change
1	All electronic bids
1	Reduce ridiculousness like resumes
1	No line item bids
1	Eliminate "price as the determining factor" myth
1	Unreasonable delivery schedule
1	Timelines on bid response
1	Need to connect with district legal and finance staff
1	Buying groups used low-price for procurement
1	Develop specifications template
1	Look at production records for procurement
1	Do the pre-testing
2	Previously "more competitive" what does it mean to be a better customer?
2	Committed volume v. committed purchasing
2	Limit competing SCUs
2	Hard to learn the complexities of USDA procurement
2	Focus on what we can fix
2	Streamline best practices
2	Need student input, stay student-focused
2	Support smaller districts, can we connect with larger districts
2	Distribution has to be part of the solution
2	Look at other heavily regulated sectors that make them better customers
3	Standardized forms and streamlined processes may increase response due to simplicity
3	Training on why supply chain partners need good forecasting
3	Need an instructional library
3	Make it so simple to remove anxiety
3	The current system feels punitive.
3	Districts lack recognition, which strains relationships.
3	Education on the process is needed.
3	Standardized forms could streamline the situation.
3	Simplifying the bidding process benefits both districts and vendors, allowing vendors to better prepare.
3	With standardized forms, more manufacturers may be interested in entering our industry.

3	These forms could reduce the fear factor in procurement, turning it into an opportunity for coaching and mentoring.
4	How do we make SFAs more attractive to distributors/vendors?
4	Should the Pain Point be restated as “Create a best practice school nutrition procurement model to make them a better business partner”
4	Large procurements provide more buying power, but may eliminate smaller distributors/vendors
4	Bids should be able to be broken apart to get smaller distributor/vendor response
4	Need a customizable model and various models for different size SFAs
4	Have different values-based model RFPs suitable for small, medium, large, co-ops
4	Need training and education away from cost to best value trade-off
4	Do SFAs know their options?

Appendices I. TeamUp Utah Evaluations and Report





TeamUp Utah

Value-Based Procurement

INFO@URBANSCHOOLFOODALLIANCE.ORG

Focusing on Quality, not Quantity

This training was organized by the Urban School Food Alliance USDA Cooperative Agreement on Improving School Food Procurement and the Utah State Board of Education, Child Nutrition Department.

"The need for hands-on, in-person training is essential to make changes, particularly in small school districts and for new school nutrition directors."

- Dr. Katie Wilson

Event Details	April 19, 2024	Sandy, Utah
<p>80 Total Participants</p> <p>Training takeaway spotlights</p>	<ul style="list-style-type: none"> Going to farmers market and pick up/purchase leftover produce. Top Values: Nutrition, Quality, Taste, Local, then Cost. 	<ul style="list-style-type: none"> Dedicating a portion of budget to purchase local. Set up a donation program! It's easier to turn a small boat than a large ship! Thinking deeper about Utah produce beyond seasonal fruit. Farmers becoming vendors for the bid process. Visiting local farms with students and staff!
<p>3 Expert Panelists</p> <p>Presented on Value-Based Procurement Practices</p>	<p>Miguel Villarreal, MBA, Interim Co-Executive Director, National Farm To School Network</p>	<p>Bertrand Weber, Culinary and Wellness Services, Minneapolis Public Schools</p>
<p>3 Utah Panelists</p> <p>Presented on local Utah Procurement Practices</p>	<p>Kelly Orton, SFS, MBA, Director of Child Nutrition, Salt Lake City School District</p>	<p>Jo Dawson, MS, SNS, Child Nutrition Consultant, formerly Child Nutrition Programs at the Alaska Department of Education and Early Development</p> <p>Paula Loveland, CNP Supervisor, Iron County School District</p> <p>Marci Johnson, Foods Director, Reagan Academy</p>

The Urban School Food Alliance

Training Feedback

<p>Training Objectives met by activities</p> <p><u>29/33</u></p>	<p>Training helped rethink quality vs. lowest price.</p> <p><u>26/33</u></p>	<p>Training had a clear purpose.</p> <p><u>33/33</u></p>
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USDA Cooperative Agreement

USFA will be hosting a number of TeamUp trainings around the country for the duration of the USDA Cooperative Agreement. The TeamUp trainings will be conducted on specific procurement topics rather than a broad overview of procurement.

Appendices II.

TeamUp Utah Expert Panelist Bios

Miguel Villarreal, MBA, Interim Co-Executive Director, National Farm to School Network: With over 30+ years' experience as a School Food Service Director in public schools in Texas and California, Miguel pioneered locally grown food in schools, plant-based meals, and removing highly processed foods from the school menu. His innovative broad-based community model and established credibility among many collaborative partners, including school groups, community allied groups, health allied organizations, farmers, local and national policymakers, state and national allied organizations, and foundations gave his programs a high degree of success that supported and contributed to the efforts of creating sustainable, equitable, nutrition and wellness environments in schools and community. He serves on numerous local, state, and national Boards focused on improving the Culture of Wellness in communities. He currently serves as the Interim Co-Executive Director for the National Farm to School Network.

Bertrand Weber, Director, Culinary and Wellness Services, Minneapolis Public Schools, USFA Advisory Procurement Workgroup Member: Bertrand Weber's career spans over 40 years of combined management experience in the hospitality industry and school food service. Trained in hotel management, Bertrand has managed some of the finest hotels and resorts on the East Coast. His compassion for the well-being and future of our children and our environment led Bertrand to the Hopkins School District, Minnesota in 2003. Bertrand's progressive thinking at Hopkins received national recognition. His efforts were the focus of several University of Minnesota research papers. In 2004 he initiated one of Minnesota's first Farm to School Programs which led to another research paper in 2005 "Making the Farm to School Connection" Currently, he is the Director for Minneapolis Public School Culinary and Wellness Services since January 2012. Bertrand initiated rethinking MPS School Lunch in 2013, Market Cart Salad Bars have been introduced in every school, and all 7 high schools, 5 Junior High Schools and 40 elementary schools have returned to scratch cooking with 3 more scheduled for the 2023-2024 school year. MPS is on the leading edge of the Farm to School movement contracting forward with over 14 local farms. Bertrand introduced MN Thursday in 2014 which features lunch sourced 100% from Minnesota. Bertrand has served as the lead District of School Food Focus Midwest, Chair of SNA Major City Committee Chair and Advisory Board Member of the National Farm to School Network and SNA Professional Development Committee. Currently, Bertrand participates as a member of IFMA K-12 Advisory Council, Chef Ann Foundation Lunch Box, School Nutrition Culinary Institute Advisory Board & Scratch Works.

Jo Dawson, MS, SNS, Child Nutrition Consultant: Jo Dawson currently is a Child Nutrition Consultant and the Contractor for the Advisory Procurement Work Group for the Urban School Food Alliance; before this role, Jo spent eighteen years with the Child Nutrition Programs at the Alaska Department of Education and Early Development. In her tenure there, she coordinated various programs including the NSLP, the CACFP, and USDA Foods/TEFAP before becoming the state director for eleven years. Jo's goals as state director were customer service orientation and the development of resources and tools to be successful, particularly for the rural communities. Ms. Dawson is a former president of the Alaska School Nutrition Association and nominated twice for the Governor's Denali Award for Leadership. Jo has a Bachelor of Science in Business Management and a Master of Science in Management & Leadership. Jo has served on the School Nutrition Association Professional Standards Committee and State Agency Advisory Council. During this time, Jo also owned and operated the only ServSafe training and certification business in Southeast Alaska. A lifelong Alaskan, Jo recently retired from the state agency and relocated to Georgia with her husband and their youngest daughter where they enjoy the best winters ever. In addition to her work as a Child Nutrition Consultant, Jo sits on the Georgia Grown Trail 17 board to support agrotourism in coastal Georgia.

Appendices III: Pain Points Prioritized and Votes

Table 8: Pain Points, Prioritized by Table, Voted by All	Duplicate	Vote
Table 1		
Bid process	x	1
Federal, state, and local alignment		12
Complexity of procurement regulations		13
Training needs		6
Electronic bid process		5
School districts must compete in the food service sector/business model/profit logistics/long term contract, flexibility (be a good partner/customer)		12
Table 2		
Overreliance on low-cost		10
Diversity of schools based on size and location		1
Lack of consistency w/ state agencies		7
Lack of procurement training		3
Bid process with antiquated non-value-added steps/procedures		7
No room for small/local/regional producers		7
Table 3		
Identify all players & individual needs to assist in the collective priority to feed & nourish students		11
Technology & GDSN integrate w/ SFAs, Distributors, manufacturers	x	8
Education & Training: exposure to products; tech solution needed	x	4
Distribution and manufacture disconnect		0
Consistent federal program implemented across 50 kingdoms	x	9
Procurement process	x	1
Table 4		

Channels of restrictive distribution that limit access to multiple brand options		1
Best practices/training beyond regulations (less regulation)	x	0
Inability of FSDs to educate superiors on purchase decisions. Easy to make decisions on lowest price		0
Poor procedures, needless redundancy. Respond with “x” number of copies. Updated.		0
Lack of understanding of the private sector (i.e., cost of bid response, investments made, no long-term commitment, SFAs need to respect contracts entered		6
Forecasting, communication		1
Table 5		
Time/Tools for proper procurement		7
Procurement rules: Federal/state/local	x	2
Partnerships/flexibility between schools, manufacturers, distributors	x	0
Lack of forecasting to distributor/manufacturer		14
Procurement training at all levels	x	3
Specialized CN products not in commercial market	x	0

Appendices IV: Action Plan Suggestions

Lack of state/federal/local alignment

Suggested Goals:

- Unify under the Dept of Ag; USDA should be the sole interpreter of the rules.
- To produce materials the USDA can provide to the state agencies and areas when there is flexibility.
- Need clarity on who (fed, state, school board) is setting the rules to empower practitioners to advocate for change/alignment.
- Process flow chart for procurement regulations rules (fed/state/local) included in training on procurement template.
- USDA reviews state policies over federal, and where they find it overly restrictive, change it (i.e., USDA foods use/entitlement).

Suggested Action Items:

- USDA requires States to submit their procurement regulations for schools. Review for overly restrictive policies that may limit districts' use of entitlement funds.
- Look at the current flow chart for the current reporting/regulation process. Revise the flow chart to the desired reporting & process.
- Workgroup to further define/identify areas where there is no alignment & scope out what topics/types of materials would be relevant with an emphasis on flexibility.

Create the best practice school nutrition procurement model to make SFAs better customers (revised from School districts must compete in the food service sector)

Suggested Goals:

- Incentivize the use of best practices to allow states to create training resources instead of only regulatory compliance.
- Forecasting is the single most important action SFAs can take to improve procurement (forecasting template).
- Promote RFPs over low-priced bids. Train in writing goal RFP and understanding who you are doing business with.
- Improve everyone's understanding of their place in the supply chain and the needs of others' roles.
- BVTO v LCTA: elevate other than price, procurement award methods as opposed to low cost.

Suggested Action Items:

- Brainstorm incentives states can provide SFAs to adopt best practices.
- By consensus, identify the best practices from stakeholders that can be implemented.

Electronic Bid Process/Technology

Suggested Goals:

- Standardization of universal bid components (i.e., federal requirements). Using this tool assures SFAs are covered/compliant.
- Training support for SFAs.
- Incentive to use and remove punitive compliance instances.
- Elements of an electronic marketplace accessible to all.
- Includes a 50-state component (+ territories) that can be regularly updated (i.e., a living resource) with long-term investment & IT support – like a Turbo Tax interface but with universal open access (no or low fee).
- Include a suggested bid timeline by bid category and forecast template linked to the bid template.

Suggested Action items:

- Conduct a gap analysis/current state analysis of what currently exists and where are the gaps.

- Procurement rules/template; Directory of suppliers (marketplace); Technology compatibility with USDA's capacity.
- Identify the current tools that exist that can be used to create the "turbo tax" model (i.e., region 10's tools, LA Unified).
- Explore existing software companies that could integrate inventory management, menu planning, nutritional analysis, etc. to assist in forecasting/populating templates.
- Committee to identify a defined list of federal procurement requirements and create a standardized document, USDA certified (i.e., if SFA uses template = CN label, they are safe).

Training

Suggested Goals:

- Precision topic-specific training on procurement best practices with training tools widely distributed and on-demand.
- Deeper understanding of the supply chain from beginning to end.
- Utilize ICN, SNA, and state programs to incentivize training with a unified message, clearly defined.
- The USDA creates procurement/sales-specific CEU training for the entire supply chain. User/seller/buyer has free annual CEU requirements.
- USDA houses the repository of best practices & training for all sectors of the industry and has someone vet it and organize it into subjects (work with ACDA on this).

Suggested Action Items:

- Create a subcommittee/task force; Assess/identify specific training needs; Evaluate current training available; Identify current training available; Identify USDA experts/resources/capacity to evaluate training content; Map out all stakeholders in the supply chain who need training.
- Identify the procurement experts, and create best practices for common curriculum creation, in addition to USDA; Identify knowledge gaps in training.
- The committee evaluates available training, assesses what is missing, and works towards creating training for all segments.
- Create training materials based on input from partners that apply to SFAs, agencies, distributors, & manufacturers.

Forecasting

Suggested Goals:

- Incentives, rather than punitive action use USFA's template – get a pass on something on AR per USDA.
- Have tools and Resources for schools; Create a uniform forecast template with all the information manufacturers and distributors need to meet demand.
- Template for operators to use for forecasting that includes the ability to show historical data, and meal service (i.e., universal) that is shared with manufacturers and distributors; Required for SFAs using a simple, standardized system with access to data and training.
- Education around why forecasting is important and aligning forecasting better with reality; commitment to buy. Include scenarios that impact meal participation.

Suggested Action Items:

- Form a subcommittee for template creation.
- Stakeholder input for items to include in the template.
- Procurement timeline creation; best practices for all stakeholders.
- Identify tools and training already out there to create a common curriculum.
- Form multiple committees to address the needs of all parties.

- SFAs are required to do forecasting as part of the procurement process using the forecasting tool (refer to training suggested on forecasting).
- Put together materials to educate why forecasting is important.

Regulation complexity

Suggested Goals:

- Building alternatives to low-cost bidding.
- How are we educating & what platforms are we using?
- Identify specific antiquated regulations at the federal, state, and local levels, that can be changed/improved/removed; Regulatory template similar to the National Processing Agreement, manufacturers/distributors can get certified for compliance with federal requirements; Create a solicitation packet that mimics the AMS Master Solicitation of federal requirements.
- Add a regulatory requirement that each state create a template of state requirements.
- Clear, concise, and relevant to the goal of feeding children.

Suggested Action Items:

- Creating a task force to identify antiquated regulations at the federal level
- Identifying categories
- No purposes/outdated
- Burden outweighs value
- Focusing on priorities essential to the program (pilot at some SFAs)
- Developing best practices and education material that help stakeholders understand/empower to use criteria other than price for award
- Coordinate with template and training
- Creating an education campaign that debunks “lowest cost” has to be the sole reason to award the bid. Need to debunk the “lowest cost” assumption

Appendices V: Draft Webinars for Local Producers One Pager



Among Local Producers and School Food Procurement Information Sheet

School Districts of all sizes are a potential market for local producers. The process that schools undertake for purchasing their food items for student is formally called “procurement”. Through this procurement process, school districts can connect with local producers to bring fresh, local foods to students. This is also referred to as “Farm to School” which is a movement around the country to make local foods more accessible to school districts.

Connecting Producers with School Districts

- “Procuring food from local sources is a powerful way for school food authorities to leverage their collective voice to transform school food and our broader food system.”

Why it Matters?

- To support for school meal service: Engaging in local procurement can significantly increase school meal participation rates by students and teachers.
- To the local economy: Each dollar invested in local purchases creates up to \$2.16 in additional economic activity to the region.

What is Urban School Food Alliance’s (USFA) role?

- Facilitation of meeting for local producers and potential school nutrition customers.
- Creation of the Producer Toolkit for school districts and producers.
- Sharing best practices.
- Technical reporting on project progress.

What is “Procurement?”

- The procurement process in school food service involves the acquisition of food, supplies, and services required to operate a school cafeteria efficiently.
- School districts can procure food from local producers to feed the kids in their school.
- Procurement is a complex system, which is why USFA wants to help you understand this process and all that is involved.

Next Steps

- Schedule an in-person meeting with producers to discuss school marketplace engagement.
- USFA can provide an overview of procurement to producers.

Contact Information:

For any queries or additional information, please contact:

Cooperative Agreement Administrator:
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USFA is a membership organization working to create a more sustainable food system.

Appendices VI. TeamUp at ANC, Boston, MA, "TeamUp for Forecasting Procurement Success."

Lead Mentor: Carol Chong, Consultant Trainer – Institute of Child Nutrition

Expert Panelists:

Jennifer Armstrong, VP, Don Lee Farms

Keri Warnick, Coordinator, Multi Region Cooperative, TX

Robin Bowman, VP, Core Foodservice

Dorothy Cole, Gordon Foodservice

Alicia Pitone Hauser, Director, San Diego Unified School District, CA

Monica Deines-Henderson, Director, District 49, Colorado Springs CO

Wanda Judie, Director, Chilton ISD, TX



TeamUp Boston Evaluations

The participants of TeamUp Boston were surveyed with 10 questions at the event's conclusion. All responses have been documented in the accompanying tables and graph

Questions asked
The training had a clear purpose.
The objectives met the training activities.
The training was organized and well run.
The training followed the agenda posted.
We stayed on task.
I heard new ideas and concepts I can take back to my district.
The training energized me to think more about forecasting
I left with a plan to improve my forecasting for the next round of procurement in our district.
This training helped me rethink my role as a business partner in procurement.
I feel this was worth my time today.

Appendices VII. Pain Point Matrix Full Version

