Eat Smart—Farm Fresh!

A Guide to Buying and Serving Locally-Grown Produce in School Meals

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Introduction

Farm-to-school encompasses many types of programs and school experiences such as planting and tending school gardens, educating children about nutrition, and of course, purchasing fresh, locally-grown farm products. While we believe all aspects of the farm-to-school experience should be encouraged, the handbook is written to address the needs of farm-to-school programs that involve schools’ purchase of produce from local farmers for use in school meals.

Many federal and private organizations are working to promote farm-to-school programs. However, many existing farm-to-school publications do not address the specific considerations and challenges faced by schools in buying local produce, particularly in the procurement area.

This handbook is written for school food service personnel. Rather than cover all areas of farm-to-school issues, we have chosen to focus on those areas we believe are of most interest to schools: procurement, types and examples of farm-to-school distribution models, how to find locally-grown food and farmers, menu planning considerations, and strategies for success. The handbook also contains a comprehensive, annotated bibliography of additional farm to school resources that may be accessed online or by contacting the organization. Whether your school is considering a farm-to-school program, or looking for resource information to assist you in your current program, we hope this handbook will be of help.

Good luck with your program!

USDA Food and Nutrition Service
Distribution Models for Farm to School

With farm to school programs, the transport of farm products to the schools is in many cases the most challenging issue to be addressed. There is no “one size fits all”, as individual circumstances differ greatly. Some of the issues to consider are: school district size and the existence of central kitchens or satellite kitchens; the storage capacity of the schools; the existence of farmer cooperatives or networks; the capacity of these networks to deliver; the distance involved with deliveries; the volume and type of products desired; and the amount of staff time needed to research and develop the distribution method. Below are descriptions of four distribution methods, and the advantages and disadvantages of each. Whatever method is chosen, it should address the needs of both farmers and food service, in order to be successful over time.

Food service staff buys direct from individual farmers.

Many school food service directors from around the country have initiated purchasing relationships with farmers, and buy directly from those farmers. There are many benefits to this procurement method, as food service staff can: request specific products in the form they need them; work out details and issues without a middle man; become familiar with what the farmer grows, and even request that farmers plant specific items for them. One additional advantage is that buying from individual farmers may exempt the purchase from bidding requirements as the total amount may be below the required bid minimum. (Food service directors are required to put out to bid any order greater than a specific dollar amount. For example, a school district may require that any purchase over $15,000 must go out for at least three bids. However, if the purchase is less than $15,000, the school is not required to obtain bids. The amount of the bid requirement can be defined at the school, school district or state level.)

The disadvantages of this procurement method become apparent if food service staff is buying from a number of farmers. Buying from individual farmers entails increased administration and paperwork. This can be quite overwhelming for a food service director who has been ordering all or most of their produce from one broker. There would be a transition from making one phone call to order product, to multiple calls, multiple invoices, and

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Example 1: Olympia School District’s "Organic Choices Salad Bar"

The Olympia School District in Washington State piloted the "Organic Choices Salad Bar" in October 2002 at Lincoln Elementary. It features organic fruit and vegetable choices, whole grain breads, and a protein selection. Organic fruit and vegetable choices include greens, apples, grapes, cherry tomatoes, green peppers, potatoes, squash, and cucumbers. At the first two pilot schools, fruit and vegetable servings increased an average of 27%, and participation rates in school lunch increased by 16%.

School food service personnel first worked with two local farmers. The food service department reached an agreement with one local farmer to provide organic potatoes and squash. Another farmer started providing organic salad greens in the spring of 2003. The school food service has since expanded purchasing of local foods through a distributor and DoD Fresh.

The district’s central kitchen helps facilitate delivery for the school and the farmers. Farmers can bring their produce to one place, and the infrastructure is already established to distribute the food to other schools.

By eliminating desserts from the elementary menu (by request of teachers and parents), and reducing waste, the program has been financially sustainable. In fact, the program has not received any outside funding to date. The school district is now determining how to institutionalize the program.
coordinating multiple deliveries. In addition, a broker is generally able to provide a greater variety of produce than farmers, who are selling only what is in season and what they grow.

School food service works with a farmer cooperative.

In this model, farmers in a cooperative, or informal network, pool their resources to develop a group distribution strategy. While some farmer coops are focused solely on production, others are also involved in the marketing and distribution of farm products. Buying from a farmers’ cooperative helps the school food service director reduce the time spent on the administrative tasks involved in ordering, receiving orders, invoicing and payment. In this way, ordering is done through one person representing multiple farmers and in some cases, one delivery is made for multiple farmers. Another advantage is that cooperatives, or informal networks, can generally offer a wider variety of produce and a more consistent supply than one individual farmer.

Some farmer cooperatives have also been able to purchase cold storage facilities, a truck for delivery, and processing facilities to produce value-added products. This is a particularly helpful strategy in colder climates with a limited growing season, and is a benefit for food service staff, as they greatly appreciate receiving a bag of broccoli florets instead of a whole head of broccoli. Many school district food services do not have the labor or equipment necessary to do this kind of minimal processing.

The biggest disadvantage is that farmer networks, cooperatives or otherwise, do not exist in all regions of the country. Some new farmer networks and cooperatives have been formed as a result of the demand from institutional sales, but their numbers are limited. This model also limits contact with the individual farmers growing for the schools.

One alternative to buying from an organized farmer network is to have one farmer, or a staff person from a non-profit organization, handle some of the administrative tasks. One person could act on behalf of farmers, taking orders from food service and then contacting farmers to fill them. The school district would send one invoice to the intermediary person who would then handle the paperwork.

Example 2: GROWN Locally Cooperative

In Iowa, the local farm products that are the most popular with students include salad bar items as well as apples and applesauce, cucumbers, lettuce, carrots, broccoli, cabbage and cauliflower. The Iowa Farm to School project is the result of a collaborative effort of GROWN Locally (Grown Only With Nature), a small, local farmer cooperative, and the school food service staff at Decorah Community Schools. Their collaboration grew out of a Farm to School forum held in Ames, Iowa and sponsored by the USDA Small Farms/School Meals Initiative. The Food Service Director uses locally grown products for a salad bar and as a la carte items in four schools—two elementary, one middle school, and one high school. Farm-fresh items are particularly popular with students in the middle school and high school, which can be a challenging audience.

The GROWN Locally Cooperative provides much of the produce already washed to help reduce labor costs. However, some food preparation is needed to cut and chop the raw produce and the price of labor in the school kitchen has been the prohibiting factor in expanding this program. In response, GROWN Locally has built a small processing center licensed with the state of Iowa allowing them to provide their products in forms more accessible to school food service personnel and to extend the times products are available.
School food service purchases regional products at the farmers' market.

This strategy relies on farmers’ markets for purchasing locally grown products. In this scenario, the food service staff contact the farmer one or two days in advance of the farmers’ market, placing their order by fax or phone. The farmer then brings that order to the farmers’ market, in addition to what he or she plans to sell that day through the market. In most cases, schools use their own truck and driver, and a buyer from the school or district goes to the local farmers' market to pick up the pre-ordered product. This option is only feasible where the farmers' market season and the school calendar coincide - in places with year-round school, or moderate climates with year-round farmers' markets.

Buying directly from a farmer at a farmers’ market has the advantage of working face-to-face with growers, who know their competition is at the market as well. It also gives food service staff the opportunity to inspect the product quality, and see first-hand what other products are available. Farmers benefit from this arrangement since they can make two farm deliveries in one location - one to the farmers' market, and one to the school. This can also help to lower the price for the product, as only one trip is needed for both deliveries. However, buying at farmers’ markets can also be time consuming, as this kind of shopping involves much more labor than a phone call to a distributor.

Example 3: Santa Monica Farmers’ Market Salad Bar

When a parent suggested purchasing produce from the farmers market for a school salad bar, school food service personnel Tracie Thomas and Rodney Taylor at the Santa Monica-Malibu Unified School District were reluctant. After discussions with other parents and students about their food preferences, Thomas and Taylor decided to run a trial “farmers’ market salad bar.” Participation was overwhelming, and the program has been expanded to other schools. Grant funding helped cover the infrastructure costs, but increased participation in the school lunch program thanks to the salad bars has made the program economically sustainable.

Twice a week, school food service personnel place orders with farmers for produce, which they pick up at the Santa Monica Farmers Market. A site coordinator, assisted by parent volunteers, prepares the fruit and vegetables for the salad bar. Protein and bread items supplement the farmers’ market produce to make a complete meal. Cafeteria monitors help ensure that students choose a variety of items.

The salad bar would not have been as successful without communication among school food service staff, teachers, parents, students, farmers’ market staff, and farmers. Students and parents were involved in the initial design of the project and still inform decisions about what foods will be selected. Before the salad bars began, presentations were held to teach students how to properly use the salad bar, use appropriate portion sizes, and eat a balance of nutrients. Farmers come to the classroom and also host field trips so students learn where their food comes from and get more excited about eating local. Field trips to the farmers market have resulted in students asking their parents to return. Many of the schools are also developing school gardens, so children learn how to grow and harvest their own food. While not a primary source of food, school garden harvest is occasionally served in the salad bars.

During last year’s National School Lunch Week, the Santa Monica-Malibu School District received a special visit from Eric Bost, Undersecretary for Food and Nutrition Services, in recognition of their work. The Farmers Market Salad Bar Program has proved a model for other schools in California.
School food service orders locally grown food through a traditional wholesaler.

In this scenario, food service works with a distributor who purchases from local farms. Since food service directors already purchase from brokers or distributors, this allows them to maintain an existing relationship, as well as purchase other items that farmers are not able to provide. This method also allows for centralized billing, delivery and payment - but cuts farmers out of the communication loop with the food service director.

The major disadvantage of buying through a distributor is that it is difficult to know how diligent the distributor is being in attempting to source local product. Buying from local farmers may or may not be a top priority for a distributor who tries to fill an order with the least expensive product available. Unless the distributor is already aware of local farms, he or she may not be willing to make the additional effort to find them.

In some instances, wholesalers have worked very well with local farmers. One step food service can take is to request access to the buying records of the broker, showing the origins of the product. This can also be a requirement written into an agreement with the broker. In this model it is still important that food service staff familiarize themselves with the availability and seasonality of the products in their region in order to make reasonable requests of the wholesaler who may be responsible for sourcing the products.

School food service purchases through DoD Fresh Program.

The Department of Defense’s (DoD) Produce Business Unit provides fresh fruits and vegetables worldwide to federal and military institutions. To capitalize on DoD’s large-scale buying power, FNS entered into an agreement with DoD in 1994 to buy and distribute fresh fruits and vegetables to schools in eight states. The produce was paid for with commodity entitlement funds, and enabled schools to take advantage of DoD’s expertise in food procurement and distribution at a nominal cost. This was the start of DoD’s Fresh Fruit and Vegetable Program, otherwise known as DoD Fresh.

A huge success, DoD Fresh now operates in 45 states, the District of Columbia, Guam, Puerto Rico, and the Virgin Islands. In addition to commodity entitlement funds, schools may now use Section 4, 11, and general school funds to purchase fresh fruits and vegetables from DoD. At present, $50 million of commodity entitlement funds are allocated to states annually to procure fresh fruits and vegetables through DoD Fresh.

In recent years, DoD has worked with states to establish farm-to-school programs. Utilizing existing DoD Fresh networks, DoD establishes farm-to-school partnerships between local producers/producer organizations, state Departments of Agriculture and Education, and school food service personnel, as appropriate. Some states budget, for planning purposes, a percentage of their funds to establish a farm-to-school initiative in their state.

At present, twelve states and one territory are working with DoD in varying degrees to procure local produce for school meals. They are: AL, MS, NC, NM, TX, WV, KY, MI, CA, NY, NJ, OK, and...
Puerto Rico. DoD farm to school programs work differently in each state/territory and, unlike many distribution models, DoD programs require coordination and good working relationships among many federal, state, and local organizations. DoD often relies on state agriculture personnel or other knowledgeable agriculture organizations to facilitate these partnerships because they are familiar with growers and their capabilities.

In most DoD farm-to-school programs, the state departments of agriculture are involved in identifying farmers and farmer organizations because DoD brokers may not have connections with local farms. However, in other instances, this work has been done by non-profit organizations working on food, farming, and agricultural issues. Since this is a crucial part of the program, the department or organization taking on this task should be well connected to farmers within the region.

North Carolina exemplifies what can be accomplished when DoD and state partnerships work effectively. The program began in 1989 when the state provided 50 schools with $1,000 grants to purchase produce from local farmers. As of April 2004, North Carolina schools have purchased over $1.6 million dollars in produce from local farmers. The North Carolina Department of Agriculture and Consumer Services administers the program with DoD’s assistance and provides the warehouses and trucks needed for product storage and delivery. In New Mexico, partnering with DoD has allowed schools to add local flavor to the menu in the form of green chilies, a favorite with New Mexico schoolchildren. Begun in the 2003 school year, New Mexico’s farm to school program has purchased approximately $75,000 worth of watermelons, russet potatoes, and green chilies from local farmers to date. New Mexico relies on DoD’s existing distribution system to deliver the produce to schools and school districts.

DoD farm-to-school partnerships typically begin with a planning meeting. DoD coordinates a meeting between state agriculture and school food service personnel to determine items that could be used in the school menus. Other potential participants include farmers, food service staff from the district level, direct marketing groups that work directly with farmers, and state nutrition staff. The participants then determine, based on product availability and menu planning needs, the local produce items that will be grown for use in school meals.

Once a farm-to-school partnership is established, DoD works with the parties to ensure a successful program. DoD negotiates the actual price of product with growers or co-ops to assure that, based on current market prices, the prices are fair and reasonable. DoD is committed to paying farmers a fair price and DoD negotiations are not based on finding a “lowest cost deal.” DoD also works with growers and grower organizations to assure that all required certification, such as Blank Purchase Agreements, are in place and quality standards and post-harvest requirements are established. Standards and requirements may be set for pre-cooling of product, size, grade, and packaging. In some cases, DoD can work with processors to supply value-added produce to schools’ specifications, such as pre-bagged or pre-cut vegetables. For example, Texas is purchasing cut carrots, New York is buying sliced apples, and blueberry and strawberry cups are a big hit with North Carolina schoolchildren. Since DoD buys only Grade A produce, the quality is generally excellent.

After product specifications have been determined, DoD assists states in monitoring the crops to ensure product quality. DoD will also establish a timetable with all parties to ensure product quality and
availability meet schools’ needs. DoD often partners with states and schools to promote the benefits of buying fresh produce from local farmers.

Distribution of the produce, once harvested, varies according to farmers, schools, and states’ delivery methods and warehousing capabilities. DoD assists states and growers during the distribution process to ensure product quality and freshness are maintained. Schools are encouraged to start with a few items the first year in order to work out distribution and quality standards. As logistical and distribution issues are resolved, more produce items can be added in successive years. DoD relies on existing distribution systems to transport the farm products to the schools. In states where there is one system, the distribution can work quite smoothly. However, some states rely on multiple methods to receive product, including private food service coops and private brokers. In these situations, transportation would need to be coordinated with all parties.

Once initial start-up issues are resolved, DoD recommends that all parties meet to discuss the program’s performance. For planning in successive years, a farm-to-school “calendar” can be established, showing what local produce items can be purchased for the upcoming school year and when. Use of the calendar enables growers to make adequate plans to meet schools’ needs and allows schools to plan menus to include the local produce.

The grower or grower organization is paid directly by DoD when the produce is purchased. DoD will then bill the state, county, or school district directly if Section 4 or 11 funds are used to pay for the purchase. A school district can still purchase from DoD directly using Section 4 or 11 funds even if the state does not participate in the DoD Fresh Program. If commodity entitlement funds are used to pay for the purchase, FNS will reimburse DoD directly. DoD currently charges a flat fee for its services (currently 5.8% of the order amount). The fee is adjusted annually and reflects DoD’s actual cost of administering the program.
Building Support for Local Purchasing

When developing a local purchasing program, additional support may be helpful, and can generally be found from folks in the following three groups: within the school or school district, through farmers and farm organizations; and community and government agencies. In some instances, food service directors have met in a group with potential supporters, to determine the best way to move forward. In other situations, it may make more sense to connect at a one-on-one meeting, or in a small group meeting. In either case, here are some potential supporters of farm to school work:

**Schools**
- School food service staff
- Nutritionist
- Principals
- Teachers
- Students
- Parents, PTA
- Nurse
- School Board members

**Farmers and Places to Find Them**
- Farmers’ Markets, Internet
- 4-H groups, feed supply stores
- U.S. and State Departments of Ag.
- Roadside Stands/U-Pick/CSAs
- Commodity boards and commissions
- Farm Bureau, Cooperatives
- Cooperative Extension, Small Farm
- County fairs, farm equipment shows

**Community and Government Agencies**
- Environmental organizations
- Sustainable agriculture groups
- Anti-hunger, food security organizations
- County health and nutrition staff
- U.S. and State Departments of Agriculture
- County Agriculture Commissioner
- City Council members
- Representatives from local congressional and state representative offices

When incorporating local foods into meal programs, here are some issues to consider:

**Operational Issues**
- crops and their seasons, value-added processing, transportation and delivery, ability to meet demand, storage and food preparation capacity, menu adaptability, food safety

**Budgetary Issues**
- equipment and labor necessary for food preparation, the cost of food, staff time to develop the purchasing arrangements

**Potential Partners**
- potential partners may be involved in other components of a farm to school program such as a school garden, cooking classes, or nutrition education
How to Find Locally Grown Foods

Connect with local agricultural organizations and express interest in developing relationships with local farmers. Many State Departments of Agriculture routinely make lists of local farmers available to the public, and will be happy to provide a list upon request. Other potential sources of information about local suppliers of farm products include county extension offices, the cooperative extension department at land-grant universities, State Farm Bureaus and other State-based producer organizations.

The U.S. agricultural extension system provides an especially efficient way for school food service personnel to find out about agricultural producers in their local communities. More than 100 land-grant colleges and universities throughout the nation work with approximately 2,900 county and regional extension offices to offer specialized information and educational services to the public on agriculture/natural resource management and family/consumer sciences. Agents working at these regional and county extension offices are typically well informed about farm operations in their specific geographic area. To find the extension office nearest to you, you may consult a national list of county and regional extension offices maintained by USDA’s Cooperative State Research, Education and Extension Service, located at http://www.csrees.usda.gov/Extension/index.html, or a list of land-grant college and university extension offices, located at http://www.csrees.usda.gov/qlinks/partners/state_partners.html

Connect with local distributors and ask them to source foods from local farms. The more demand that local wholesale distributors have for local foods, the greater effort they will make in sourcing this product. In addition, food services personnel can ask local distributors to provide sourcing information about the grower/producer of local foods at the time of purchase/delivery.

Connect with institutions that purchase locally produced foods. Food service managers that are currently purchasing from local farmers are good resources for others interested in making connections. These individuals may be able to help make connections with farmers and/or distributors that supply high quality, locally produced foods, and may also be able to provide ideas for ways to best incorporate local foods into existing food service operations. (If you don’t know any food service director in your area that is managing a local procurement program, you may find it helpful to contact one of the school food service directors featured in chapter xx for tips on how to start your own local food purchases.)

Visit local farmers' markets and talk with the market managers. Market managers may be able to assist food service professionals in find farms that can supply desired quantity and quality of desired products. A comprehensive list of farmers markets across the country, along with a list of farmers market program representatives in each State, are available from the USDA Agricultural Marketing Service’s Farmers Market website, accessible at: http://www.ams.usda.gov/farmersmarkets/map.htm.
Make connections with local community food cooperatives. Local food cooperatives often have established relationships with local producers and may be able to connect food service professionals with their farmer suppliers.

Connect with a "Buy Local" campaign. Organizations that promote locally produced foods are knowledgeable about local farms in the area and may be able to connect food service managers with interested producers. These campaigns are run by local and state government organizations. You may wish to refer to Food Routes, www.foodroutes.org, for sources of local foods in your area.

Connect with local food advocate organizations. Organizations such as Chefs Collaborative, Slow Food and sustainable agriculture organizations are great places to learn about what other culinary and food service professionals are doing with locally produced foods. Members of these organizations know which farms are currently selling to restaurants and institutions. They are familiar with local products and know how to utilize them in food service menus. The contact information for the national headquarters of these organizations is as follows:

**Chefs Collaborative**  
262 Beacon Street  
Boston, MA 02116  
Phone (617) 236-5200  
Fax (617) 236-5272  
info@chefscollaborative.org

**Slow Food U.S.A.**  
434 Broadway, 6th Floor  
New York, NY 10013  
Phone (212) 965-5640  
Fax: 212-966-8652  
info@slowfoodusa.org

The Slow Food U.S.A. website also features a national directory of local chapter representatives, listed by State. This directory may be retrieved at http://www.slowfoodusa.org/contact/index.html.

Connect with nutrition education organizations. Farm to School provides a framework for schools to make a direct impact on students’ health and the agricultural community by offering more fruits and vegetables in school meals and throughout the campus. Many organizations are working with schools to prevent overweight and obesity and improve children’s health. Others promote sustainable agricultural systems and environmental education. The organizations listed below can provide ideas and resources to help you successfully implement Farm to School from a nutrition education, health or agricultural perspective:

- **National 5 A Day Partnership**: The National 5 A Day Partnership is an alliance of Federal agencies, private industry, and health organizations which have joined forces to help all Americans meet the Dietary Guidelines recommendations to increase fruit and vegetable consumption. The partnership guides the 5 A Day for Better Health Program— the Nation's largest public/private nutrition education initiative with 5 A Day coordinators in each State and territory, and in the military. Its goal is to increase fruit and vegetable consumption to at least 5 servings per day for 75 percent of Americans by 2010. You can visit the 5 A Day Web site at www.5aday.gov. Member organizations include: American Cancer Society, Centers for Disease Control and Prevention, National Alliance for Nutrition and Activity, Association of State and Territorial Directors of Health Promotion and Public Health Education, National Cancer Institute, Produce for Better Health Foundation, Produce Marketing Association, United Fresh Fruit and Vegetable Association, and the United States Department of Agriculture.
• **Team Nutrition:** Team Nutrition is USDA’s nutrition education initiative to promote healthy food choices and physical activity for school age children. Team Nutrition schools make a commitment to offer healthy school meals, encourage student to be more physically active, and build community support for a healthy school environment. USDA provides free or low cost nutrition education materials for teachers and students, and technical assistance manuals for food service staff. Check out Fruit and Vegetables Galore, USDA’s newest, colorful resource manual with useful tips to boost the nutritive value, taste, and eye appeal of school meals, and entice students to try appealing and nutritious fruits and vegetables. [www.fns.usda.gov/tn](http://www.fns.usda.gov/tn) You can gain community support by showcasing the benefits of Farm to School and improved school meal programs. USDA offers a kit, “Changing the Scene: Improving the School Nutrition Environment,” with scripts, parent newsletters, and media tips to get the word out about your efforts. USDA collaborated with 16 organizations to develop this action kit for state and local level partners to educate decision makers about the role school environments play in helping students meet the Dietary Guidelines for Americans. The kit is available at no charge at FNS’ website: [www.fns.usda.gov/tn/Healthy/changing.html](http://www.fns.usda.gov/tn/Healthy/changing.html)

• **Eat Smart Play Hard:** Let Power Panther promote Farm to School by guiding your students to eat more fruits and vegetables! This USDA initiative encourages children to eat breakfast, choose healthy snacks, and be more active. You can order free nutrition education materials in English and Spanish through the FNS website: [www.fns.usda.gov/eatsmartplayhard/](http://www.fns.usda.gov/eatsmartplayhard/)

• **Healthier US School Challenge:** The U.S. Departments of Agriculture, Health and Human Services, and Education are working together to build healthier communities that promote healthy lifestyle choices, including good nutrition and physical activity. Take the Healthier US School Challenge, and strive for Gold! Find out more about Healthier US, visit FNS’ website: [www.fns.usda.gov/tn/HealthierUS/index.htm](http://www.fns.usda.gov/tn/HealthierUS/index.htm)

• **Ag in the Classroom:** Each state, U.S. territory, and the District of Columbia has an Agriculture in the Classroom Program to promote awareness about the agriculture industry. AITC also develops curriculum for classroom activities which could link with Farm to School promotions in the cafeteria. [www.agclassroom.org/](http://www.agclassroom.org/)
Strategies for Success

Farm to School projects vary greatly by region, by community, even by school district. However, a variety of key components are inherent in most farm-to-school initiatives. Using a combination of strategies may help you develop a strong and sustainable foundation for farm-to-school in your area.

- Assess need for additional resources, adequate funding, and support from the school administrators, parents, and teachers.
- Commit to a cooperative approach with key partners including farmers, food service managers, school administrators, teachers, parents, and students in early planning discussions.
- Start small, build on success, and encourage project partners to join at their pace.
- Organize product supply; develop contact with farmer organizations, grower networks, cooperatives and/or distributors.
- Work to develop a strong educational component aimed at increasing children’s understanding and acceptance of new foods and menu formats in the lunchroom.
- Commit to healthful foods for students that model positive choices and reflect the sound nutritional advice they receive in the classroom. Don't focus exclusively on controlling costs or increasing participation.
- Build policy support at the state, local or district level for ongoing farm-to-school programming.
- Be patient and solve problems creatively; be willing to experiment.
- Communicate thoroughly, honestly, and as frequently as needed. Be sure to include all relevant partners and collaborators in important decisions.
- Promote your project through appropriate avenues such as the local media to build community awareness and support over time.
- Learn from the experiences of established programs. Share these examples with your key partners.
Procurement of Food in a Farm-to-School Project

Many school food authorities (SFAs) would like to purchase food from local farmers but are not sure of the rules for purchasing and procuring food products in a “farm-to-school” arrangement. This section will provide information on the federal procurement requirements and identify areas where the state rules must be consulted. The information is provided in a Q & A format. Areas that need individual state clarification are identified by the initials “SA” in parenthesis.

Can a SFA purchase food directly from a farmer?

Yes, as long as the SFA observes the procurement rules that apply when purchasing food with the school food service account money.

What are the available procurement methods?

Several procurement methods are available to purchase food products. All are designed to provide open and free competition. SFAs should identify which method best meets the needs of the farm-to-school project that is in place. The three most frequently used procurement methods are:

- **Competitive Sealed Bids** – A method of procurement whereby sealed bids are publicly solicited and a fixed-price contract is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bid, is lowest in price.

- **Competitive Proposals** – A method of procurement whereby proposals are requested from a number of sources and the request for proposal is publicized, negotiations are conducted with more than one of the sources submitting offers, and either a fixed-price or cost-reimbursable type contract is awarded, as appropriate. Competitive negotiation may be used if conditions are not appropriate for the use of competitive sealed bids.

- **Small Purchase** – A relatively simple and informal procurement method that is appropriate for a procurement of food, services or supplies costing not more than $100,000 (the current federal small purchase threshold), or a lesser amount specified by State law or local requirements. SFAs must check with their administering State agency and local officials to determine whether the State/local small purchase threshold is less than the federal threshold and the State or local small purchase procedures that must be followed.

Contact your state agency for additional information on these procurement methods in your state.

Which method(s) should be used for farm-to-school purchasing?

When using nonprofit food service account funds, public SFAs must follow their own state and local rules except where those rules are inconsistent (less restrictive) with the federal requirements. In those cases, the SFA must substitute the more restrictive federal requirement. Nonprofit SFAs may use their own organizational rules as long as those rules are consistent with federal requirements or a nonprofit SFA may chose to follow the federal rules in their entirety. Depending on the annual expected purchases of the
product and the applicable state and local small purchase thresholds, SFAs may be able to use small purchase procedures. SFAs should never subdivide purchases to avoid conducting a formal procurement.

What is “Open and Free Competition”?

The underlying foundation of all procurement, without regard to dollar value, is that regardless of the method used, the procurement must be conducted in a manner that provides maximum open and free competition. Free and open competition basically means that all suppliers are "playing on a level playing field" with the same opportunity to compete. Procurement procedures must not restrict or eliminate competition.

How could a SFA restrict competition?

Subdividing its purchases to avoid conducting a formal procurement:

- **Unreasonable requirements** – placing unreasonable requirements on suppliers in order for them to qualify to do business, e.g., requiring unnecessary experience and bonding requirements.

- **Noncompetitive practices** – encouraging or fostering noncompetitive practices, e.g., collusion between farmers. Failing to adequately advertise and solicit prices could encourage potential suppliers to manipulate their bid prices.

- **Conflicts of interest** – allowing conflicts of interest to occur. Conflicts of interest can occur when the individual(s) responsible for determining bid/proposal responsiveness can be overruled by other individuals within the organization or if the individual responsible for determining responsiveness (or any member of his/her family) has any personal or financial interest in any of the offering firms.

- **Writing bid specifications** – using bid specifications or contract terms written by a potential contractor.

- **Insufficient time** – not allowing bidders/offerers sufficient submission time when advertising/soliciting the invitation for bid or request for proposal.

- **Geographic preferences** – Using in-State or local geographic preferences in awarding a contract.

How can an SFA purchase from a local farmer, and follow the USDA policy on purchasing local products, when geographic preferences are not allowed?

Frequently, local officials are encouraged to purchase in-State products. In SFAs that border State or other geographic boundaries, there may be local farmers in the nearby State that could supply the SFA with food products through a farm to school project. Encouraging partnerships between local farmers and SFAs does not require the use of an in-State or local preference. The use of such preferences could prevent a qualified local farmer from competing simply because the farmer is located outside of a specific geographic area.
If the SFAs anticipated annual purchase of a particular product will be less than the applicable small purchase threshold, the SFA can use these simplified procedures and contact a number of local farmers. While the Federal small purchase threshold is currently set at $100,000, SFAs must always check with their state and local officials since many states and municipalities have LOWER small purchase thresholds.

To facilitate purchase of locally-grown produce, SFAs can: identify and encourage local farmers to submit bids; look into alternative pack sizes and distribution methods that reflect product availability, using pricing structures such as fixed delivery charges with product prices that respond to the current market price; and explore new and different products that are available through local farms.

SFAs also need to develop specifications that reflect the characteristics of the products they seek. For example, local farmers grow a specific lettuce variety that students prefer, but that the SFA cannot get through their broker or distributor. The SFA can write its specification requiring this lettuce variety. However, just writing the specification alone will not be adequate to ensure local farm participation. The SFA must have “laid the groundwork”, i.e., identifying and encouraging local farm participation for the procurement to be successful.

Can SFAs split up large purchases into smaller amounts and thereby fall under the small purchase threshold?

SFAs cannot intentionally split purchases in order to fall below the federal small purchase threshold. For example, if a SFA will be purchasing $150,000 worth of lettuce for the salad bar they cannot split the purchase into two purchases of $75,000 each. However, the SFA can specify different varieties of lettuce that must be provided and be willing to award its lettuce bid to more than one supplier.

Another approach, when an adequate number of suppliers exist, is for the SFA to conduct a procurement action for a specific item, for example, apples, instead of conducting a procurement to obtain a single supplier for all of its fruits and vegetables for the school year. This approach could allow local apple growers to compete for the SFA’s apple contract.

Can SFAs set aside a portion of their school food service funds or other funds to purchase only local product?

SFAs may not technically “set aside” a portion of food service funds, and then use such funds to purchase only local product without regard to price or fairness of the purchasing process. Such a set-aside is not allowable using the nonprofit school food service account. However, SFAs may provide a line-item in the school food service budget as designated for farm to school initiatives.

For example, a SFA may budget $5,000 for a nutrition education and farm-to-school project. In this example the SFA will use visits to local farms and the purchase of produce to teach students the value of consuming healthy foods and how those foods were produced.

If the local education agency chooses to set aside non-school food service account funds specifically for purchase of local product, they are not bound by National School Lunch Program rules but should check on the rules governing that funding source.
Do federal procurement rules apply when schools do not use money from the food service account, i.e., the school uses general fund monies?

No. Federal rules only apply to using nonprofit food service funds. However, State and local rules may apply to other school funds.

What are the Federal procurement requirements for the NSLP?

The NSLP regulations address the procurement in 7 CFR 210.21. The regulations address four main areas of procurement:

**General** – requires local school food authorities to comply with the requirements of 7 CFR 3015 (replaced in August 2000 by 7 CFR Part 3016 for public SFAs and 7 CFR Part 3019, for nonprofit SFAs) for the procurement of food, and other goods and services, when using the school food service funds.

**Contractual responsibilities** – confirm that the local school food authority is responsible for its own contracts.

**Procurement procedures** – requires that SFAs may use their own procurement procedures which reflect applicable State and local laws and regulations as long as those procedures meet the requirements of 7 CFR Parts 3016 and 3019.

**Buy American** - requires that SFAs purchase, to the maximum extent practicable, domestic commodities or products. Buy American applies to the 48 contiguous states, Hawaii and the Commonwealth of Puerto Rico. Buy American does not create the right to use an in-state or local geographic preference.

What are the requirements of 7 CFR 3016 and 3019?

The regulations at 3016 for public SFAs and 3019 for nonprofit SFAs have similar requirements. The following is an example from Part 3019:

§ 3019.44  Procurement procedures.

(a) All recipients shall establish written procurement procedures. These procedures shall provide for, at a minimum, that paragraphs (a)(1), (a)(2), and (a)(3) of this section apply.

(1) Recipients avoid purchasing unnecessary items.

(2) Where appropriate, an analysis is made of lease and purchase alternatives to determine which would be the most economical and practical procurement for the Federal Government.

(3) Solicitations for goods and services provide for all of the following:

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1 The full text of 7 CFR 210.21 is found in Appendix A.
(i) A clear and accurate description of the technical requirements for the material, product or service to be procured. In competitive procurements, such a description shall not contain features which unduly restrict competition.

(ii) Requirements which the bidder/offeror must fulfill and all other factors to be used in evaluating bids or proposals.

(iii) A description, whenever practicable, of technical requirements in terms of functions to be performed or performance required, including the range of acceptable characteristics or minimum acceptable standards.

(iv) The specific features of “brand name or equal” descriptions that bidders are required to meet when such items are included in the solicitation.

(v) The acceptance, to the extent practicable and economically feasible, of products and services dimensioned in the metric system of measurement.

(vi) Preference, to the extent practicable and economically feasible, for products and services that conserve natural resources and protect the environment and are energy efficient.

(b) Positive efforts shall be made by recipients to utilize small businesses, minority-owned firms, and women's business enterprises, whenever possible. Recipients of Federal awards shall take all of the following steps to further this goal.

(1) Ensure that small businesses, minority-owned firms, and women's business enterprises are used to the fullest extent practicable.

(2) Make information on forthcoming opportunities available and arrange time frames for purchases and contracts to encourage and facilitate participation by small businesses, minority-owned firms, and women's business enterprises.

(3) Consider in the contract process whether firms competing for larger contracts intend to subcontract with small businesses, minority-owned firms, and women's business enterprises.

(4) Encourage contracting with consortiums of small businesses, minority-owned firms and women's business enterprises when a contract is too large for one of these firms to handle individually.

(5) Use the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Department of Commerce’s Minority Business Development Agency in the solicitation and utilization of small businesses, minority-owned firms and women's business enterprises.

(c) The type of procuring instruments used (e.g., fixed price contracts, cost reimbursable contracts, purchase orders, and incentive contracts) shall be determined by the recipient but shall be appropriate for
the particular procurement and for promoting the best interest of the program or project involved. The "cost-plus-a-percentage-of-cost" or "percentage of construction cost" methods of contracting shall not be used.

(d) Contracts shall be made only with responsible contractors who possess the potential ability to perform successfully under the term and conditions of the proposed procurement. Consideration shall be given to such matters as contractor integrity, record of past performance, financial and technical resources or accessibility to other necessary resources. In certain circumstances, contracts with certain parties are restricted by agencies' implementation of E.O.s 12549 and 12689, "Debarment and Suspension."

(e) Recipients shall, on request, make available for the Federal awarding agency, pre-award review and procurement documents, such as request for proposals or invitations for bids, independent cost estimates, etc., when any of the following conditions apply.

1. A recipient's procurement procedures or operation fails to comply with the procurement standards in the Federal awarding agency's implementation of this part.

2. The procurement is expected to exceed the small purchase threshold fixed at 41 U.S.C. 403(11) (currently set at $100,000) and is to be awarded without competition or only one bid or offer is received in response to a solicitation.

3. The procurement, which is expected to exceed the small purchase threshold, specifies a "brand name" product.

4. The proposed award over the small purchase threshold is to be awarded to other than the apparent low bidder under a sealed bid procurement.

5. A proposed contract modification changes the scope of a contract or increases the contract amount by more than the amount of the small purchase threshold.
Meeting School Meals Initiative Requirements with Farm to School

Introduction

What is the School Meals Initiative?

Since 1995, the School Meals Initiative has helped foodservice directors and staff offer healthier meals and promote nutrition education to support healthy lifestyle behaviors. It establishes a framework to plan and evaluate school meals using nutrition standards (based on Recommended Dietary Allowances for key nutrients), appropriate calorie levels, and recommendations from the Dietary Guidelines for Americans. NSLP regulations require that breakfast and/or lunch menus, when averaged over a school week, meet the nutrient standards for the appropriate age or grade group. Meeting these standards is the goal for all menu-planning options. For more information about SMI requirements, refer to FNS 303-A Menu Planner for Healthy School Meals, and the Road to SMI Success: A Guide for Local School Foodservice Directors (this is still in draft).

What are the nutrition standards?

### USDA School Meals Initiative for Healthy Children

#### Nutrition Standards

- **Recommended Dietary Allowances (RDA)**
  - 1/4 RDA for age/grade group for breakfast for protein, calcium, iron, vitamins A and C
  - 1/3 RDA for age/grade group for lunch for protein, calcium, iron, vitamins A and C

- **Recommended Energy Allowances (calories)**
  - Appropriate for age/grade group

- **Dietary Guidelines for Americans**
  - Eat a variety of foods.
  - Limit total fat to ≤ 30% of calories.
  - Limit saturated fat to <10% of calories.
  - Choose a diet low in cholesterol.
  - Choose a diet with plenty of vegetables, fruits and grain products.
  - Choose a diet moderate in salt and sodium.
How can Farm to School help schools meet the nutrition goals?

Farm to School links schools with local growers to supply more fruits and vegetables for children to enjoy as part of school meals.

USDA recommends that meals include:
- a vitamin A-rich vegetable or fruit at least 2-3 times a week;
- a vitamin C-rich vegetable or fruit 3-4 times a week, and breakfasts include them frequently;
- a variety of vegetables and fruits;
- foods that are good sources of fiber, such as fresh fruits and vegetables and whole grain products.

Iron, Vitamins A and C, fiber, and phytochemicals found in fruits and vegetables play an important role in optimal health, and protection against chronic diseases. Offering a wide variety of fruits and vegetables also supports the DGA recommendations.

Planning menus that offer more fresh fruits and vegetables

Planning menus involves much more than listing which foods you offer each day. As you evaluate your current menus, keep in mind these basic principles: (see Menu Planner for Healthy School meals, Chapter 4.)

- **Balance:** Flavors, textures, colors
- **Variety:** Cooked vs. raw, different shapes and textures, familiar and new foods
- **Choices:** Include regional and cultural preferences; let students choose.
- **Contrast:** Strive for contrasts of texture, flavor, and methods of preparation.
- **Color:** Use fruits and vegetables to add natural color to entrees, side dishes
- **Eye Appeal:** Offer fruits and vegetables in an attractive way on the serving line or salad bar. Use garnishes.

Which menu planning system do you use?

The requirements for meeting the nutrition standards will depend on whether you use a Food-based menu planning or nutrient-based menu planning system. At lunch, schools using food-based systems must offer at least 2 servings of different fruits or vegetables, with a total volume of at least ¾ cup, and a minimum 1/8 cup portion size.

For schools using nutrient-standard menu planning, there is no minimum requirement; however, in order to meet the Dietary Guidelines goals, it is recommend to offer at least 2 different fruits/vegetables totaling at least ¾ cup. Remember, the goal is to increase the variety and amount of fruits and vegetables offered through school meals.
Other points to consider when offering more fruits and vegetables:

- **Product availability**: Use foods in season, at the peak of flavor and lowest cost. Offer fresh whenever possible.
- **Staffing and equipment**: Is there adequate refrigeration/freezer space? Do you have sufficient counter space, sinks and preparation equipment? What about serving tools and dishes or compartments in a compartment tray needed to serve each meal? Can employees prepare in the time available? How much hand preparation is required for each menu? Schedule employees’ time so their particular skills can be used to best advantage. Balance the workload — food preparation and clean-up — from day to day and from week to week.
- **Use the Food Buying Guide** to plan adequate portion sizes – remember that the “as purchased” weight or volume is greater than the “as consumed” volume.
- **Know your customers**: Be sure to get input from students and staff when designing cycle menus.

Purchasing and Preparing Fruits and Vegetables²

Foods you serve can only be as good as the quality of the foods you purchase. Careful use of competitive buying will not only help control food costs but will also help upgrade the quality of your meals. Here are some additional tips...

- **Be familiar with sources of supply.** Buy from growers who provide the best quality food at the most reasonable prices. Seek out potential new suppliers. Put them on your mailing list for bids and requests for proposals. Also look for opportunities to buy through cooperative purchasing groups (co-ops).
- **Buy according to how you will use a product.** Consider grade, style, type, size, count, container, and packing medium. Develop clear, concise purchase specifications and food product descriptions. To ensure the purchase of quality foods at competitive prices, write specifications and descriptions that will make clear what you want and what you will accept. (Refer to First Choice and Choice Plus, NFSMI).
- **Inspect upon delivery.** Make sure what is delivered meets your specifications.
- **Remember storage facilities.** Decide when to buy each type of food, keeping in mind perishability and storage space.
- **Keep records of food purchases.**
- **Use standardized recipes, even for salad bars.**
- **Determine equipment needs.**
- **Balance workload and delivery schedules.**

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² See Fruits and Vegetables Galore and NFSMI resources.
Marketing Fruits and Vegetables

A promotion provides an excellent opportunity to introduce new menu items. But don’t overdo it — show only one new fruit or vegetable item at a time. A total of two or three in a month is plenty! To make sure students notice:

- Make the new food item sound appealing on the printed menu.
- Offer an incentive — a reward for choosing the new food.
- Display a poster that lists the food’s nutritive value. Look for resources from commodity groups such as Peach Growers, etc.
- Introduce new foods in the classroom or plan small portions when first offering a new food.

Strategies to Incorporate Farm to Cafeteria Programs

- **Salad Bars**: Showcase local foods in a salad bar as an alternative entrée choice or in combination with other entrees. One advantage of a salad bar is that local foods can be incorporated when available. Use colorful signs to help children choose enough.
- **Teacher Nutrition Education**: Serve local foods in the cafeteria that are featured in nutrition education curriculum in the classroom or school garden.
- **Main Dish Items**: Incorporate local foods in your favorite lunch entrees; and offer more vegetarian choices. For example, add color and crunch to pizza using green peppers, zucchini, etc.
- **Side Fruit/Vegetables**: Serve locally produced fruits or vegetables as a side dish for lunch. Locally produced fruits, such as apples, pears, berries or melons, can be served with cereal as a breakfast option.
- **Special Events**: Host a "Harvest Festival" in the cafeteria, showcasing many different locally produced foods at one event, or showcase one locally grown product each month. Introduce different foods to students and educate them about what foods are produced locally. Partner with teachers, health or agriculture groups which can provide resources and assist with marketing the event. Make the cafeteria the fun, “in” place to have lunch!

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3 See Fruits and Vegetables Galore and Chapter 8 in Menu Planner.
Maximize your Nutritional Impact!

### Vegetables High in Recommended Nutrients

<table>
<thead>
<tr>
<th>Iron</th>
<th>Vitamin A</th>
<th>Vitamin C</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Best Sources</strong></td>
<td>Beet greens, carrots, Swiss chard, red chili peppers, collards, dandelion greens, kale, mustard greens, peas and carrots, sweet red peppers, spinach, winter squash (acorn, butternut, Hubbard), pumpkin, sweet potatoes, turnip greens</td>
<td>Beet greens, carrots, Swiss chard, red chili peppers, collards, dandelion greens, kale, mustard greens, peas and carrots, sweet red peppers, spinach, winter squash (acorn, butternut, Hubbard), pumpkin, sweet potatoes, turnip greens</td>
</tr>
<tr>
<td><strong>Good Sources</strong></td>
<td>Broccoli, chicory greens</td>
<td>Broccoli, chicory greens</td>
</tr>
<tr>
<td><strong>Other Sources</strong></td>
<td>Green asparagus, green chili peppers (fresh), endive, escarole, tomatoes, tomato juice or reconstituted paste or puree</td>
<td>Green asparagus, green chili peppers (fresh), endive, escarole, tomatoes, tomato juice or reconstituted paste or puree</td>
</tr>
</tbody>
</table>

### Fruits High in Recommended Nutrients

<table>
<thead>
<tr>
<th>Iron</th>
<th>Vitamin A</th>
<th>Vitamin C</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Best Sources</strong></td>
<td>Mangoes</td>
<td>Mangoes</td>
</tr>
<tr>
<td><strong>Good Sources</strong></td>
<td>Apricots, cantaloupe, papayas, purple plums (canned).</td>
<td>Apricots, cantaloupe, papayas, purple plums (canned)</td>
</tr>
<tr>
<td><strong>Other Sources</strong></td>
<td>Red sour cherries, nectarines, peaches (not canned), prunes.</td>
<td>Red sour cherries, nectarines, peaches (not canned), prunes</td>
</tr>
</tbody>
</table>
Additional Resources on Farm-to-School Programs

Information Clearinghouses

The **Center for Food and Justice**, a division of the Urban and Environmental Policy Institute at Occidental College in Los Angeles, CA, maintains links to topical press articles and timely research on national farm-to-school activities on its “Farm to School” website, located at www.farmtoschool.org. The mission of the Center for Food and Justice is to promote sustainable and socially just food systems by engaging in collaborative action strategies, community capacity-building, research and education.

The **Community Food Security Coalition (CFSC)**, a non-profit organization based in Venice, CA committed to building strong, sustainable, local and regional food systems, maintains an extensive array of resources on farm-to-school programs, including publications, case study examples, and information on funding possibilities, on its “Farm to School” program website, accessible at http://www.foodsecurity.org/farm_to_school.html. Through the leadership of its National Farm-to-School Program Director, Marion Kalb, the Coalition also offers direct technical assistance to individuals and groups interested in starting farm-to-school projects in their communities. For further information, please contact Marion Kalb, CFSC’s Farm to School Program Director by e-mail at Marion@foodsecurity.org or by telephone at 530-756-8518, ext. 32.

The **Cornell University Farm to School Program** develops strategies and disseminates information to increase the amount of locally grown food served in New York’s schools, colleges and universities. Information featured on Cornell’s Farm to School Program website includes practical tips about initiating connections with local farmers and schools, examples of successful farm-to-school marketing and educational programs at the elementary, middle and secondary school level in New York State, an overview of regulatory and legislative requirements affecting school meal preparation, and a directory of available local foods. The website may be accessed at http://www.cce.cornell.edu/farmtoschool/index.htm.

**FoodRoutes** is a national nonprofit organization dedicated to reintroducing Americans to the origin of their food—the seeds it grows from, the farmers who produce it, and the routes that carry it from the fields to our tables. As part of its ongoing effort to build local, community-based food systems, FoodRoutes has dedicated a section of its website to the growing farm-to-school movement. This portal offers instant access to an extensive library of published reports on farm-to-school activities, and may be found at www.foodroutes.org/farmtoschool.jsp.

The **U.S. Department of Agriculture’s Agricultural Marketing Service (USDA/AMS)** maintains a website devoted to marketing channel research and development, which features several publications that examine the growing importance of schools as a market outlet for local agricultural products, and offer tips and strategies to producers and school foodservice personnel alike to enhance the success of farm-to-school marketing and procurement. The website may be accessed at http://www.ams.usda.gov/tmd/MSB/MarketingChannels.htm.

For further information about USDA/AMS farm-to-school resources, please contact Debra Tropp, Team Leader, Market Channel and Postharvest Research and Development, Marketing Service Branch, USDA Agricultural Marketing Service by e-mail at Debra.Tropp@usda.gov or by telephone at 202-720-8317.
Research Reports and Planning Guides

Bringing Local Food to Local People: A Resource Guide for Farm-to-School and Farm-to-Institution Programs, Barbara C. Bellows, Rex Dufour and Janet Bachmann, Appropriate Technology Transfer for Rural Areas (ATTRA), Fayetteville, AR, October 2003, 28 pages.

This handy reference tool identifies potential sources of funding and technical assistance for farm-to-school marketing from government and non-government sources, examines the impact of 2002 Farm Bill legislation on the development of farm-to-school programs, recommends strategies to enhance the likelihood of successful project implementation, and provides a comprehensive list of contacts and information about ongoing farm-to-school marketing activities across the country. The free guide may be retrieved electronically at http://attra.ncat.org/attra-pub/PDF/farmtoschool.pdf or may be obtained by calling the following toll-free number, 1-800-346-9140.


Developed for use in the State of Washington, this handbook provides customized guidance to farmers, food service buyers and community organizers alike on how to enhance procurement of locally grown farm products by schools and other food service institutions. Among other issues, the handbook evaluates the comparative cost of serving locally produced foods versus alternative food sources, provides recommendations on how to identify sources of locally grown farm products, discusses legal requirements involved in sourcing food products directly from farms, and offers insights about how to incorporate local foods in school menus. The handbook also includes case studies of several successful farm-to-school and farm-to-cafeteria programs in Washington State, Iowa and Wisconsin. Copies of the free handbook may be downloaded from the WSDA Small Farm and Direct Marketing Program website at http://agr.wa.gov/Marketing/SmallFarm/102-FarmToCafeteriaConnections-Web.pdf or may be obtained by contacting Kelli Sanger, Coordinator of WSDA's Small Farm and Direct Marketing Program, at (360) 902-2057, or at smallfarms@agr.wa.gov.

Farm to School: An Introduction for Food Service Professionals, Food Educators, Parents and Community Leaders, Alison Harmon, et al., 2003, 73 pages.

This manual is designed to introduce school food service professionals and other interested community members to the benefits of using regional and seasonal foods in school meal programs. It addresses the contribution of farm-to-school programs to the development of sustainable local food systems and the achievement of nutritional goals, provides technical guidance on establishing direct procurement programs between schools and local farmers, and shares valuable insights from participants in farm-to-school projects from California, Florida, Kentucky, Iowa, New Mexico, New York and Pennsylvania. Copies of the manual may be retrieved electronically from the Center for Ecoliteracy website at http://www.ecoliteracy.org/pages/rethinking/downloads/FarmitoSchoolGuide1.pdf, while published copies of the manual may be obtained for $12.00, plus $4.00 for shipping and handling, from the Community Food Security Coalition. Checks and money orders should be made payable to the Urban and Environmental Policy Institute (UEPI) at Occidental College, and should be sent to Sandra Ramirez, UEPI, Occidental College, 1600 Campus Road, Los Angeles, CA, 90041.
Fresh From the Farm. . .And Into the Classroom: A Los Angeles Unified School District Pilot Project, Margaret Haase, Andrea Azuma, Robert Gottlieb, and Mark Vallianatos, Center for Food and Justice, Urban and Environmental Policy Institute, Occidental College, January 2004, 26 pages.

The report evaluates the impact of an educational program carried out at more than 40 school sites within the Los Angeles Unified School District during the 2002-2003 school year, which attempted to create a unique hands-on learning experience for schoolchildren through a direct connection between classrooms and an organic farm in Southern California. Activities sponsored through the program included class lectures by farmers and/or field trips that provided information about how food is grown, along with classroom tasting and sample programs that introduced schoolchildren to unfamiliar fruits and vegetable items/varieties. These programs were incorporated into lesson plans on health, nutrition, cooking/food preparation, agriculture, and environmental education. The report contains extensive feedback from educators about their level of satisfaction with the pilot project, along with an analysis of the challenges involved in establishing permanent funding for this type of educational endeavor. Electronic copies of the report are available for free from the Center for Food and Justice website at http://departments.oxy.edu/uepi/cfj/ReportFINAL.pdf.

From Asparagus to Zucchini: A Guide to Farm-Fresh, Seasonal Produce, Madison Area Community Supported Agriculture Coalition (MADSAC), Madison, WI

Although this guide originally was developed to provide information to participants in Community Supported Agriculture projects, it includes 135 pages of vegetable information and seasonal recipes of practical interest to school food service personnel. Published copies of the guide may be purchased for $19.00 from the Wisconsin Rural Development Center, 4915 Monona Dr., Suite 304, Monona, WI 53716, Phone 608-226-0300, Fax 608-226-0301.

Get Fresh Get Local, Kelly Erwin (consultant to the Massachusetts School Food Service Association), June 2004, 15 pages.

This report, funded by a grant from the Massachusetts School Food Service Association (MSFSA), analyzes the results of pilot farm-to-school programs carried out between September 2003 and June 2004 by MSFSA at five separate school districts throughout the state of Massachusetts (Belchertown, Hudson, Maynard, Middleboro and Worcester), representing a diverse range of rural, suburban and urban communities. The report examines the current status of local food procurement initiatives at each school district, provides an overview of next step strategies being considered by these school districts, offers examples of educational programming and foodservice training that can be used to successfully complement local purchasing activities, and shares recommendations for encouraging greater school food service and farmer participation in local farm-to-school marketing campaigns. Copies of the report may be obtained for $6.00 apiece by contacting Kelly Erwin in Amherst, MA by phone at (413) 253-3844 or by e-mail at kelerwin@localnet.com.

This detailed policy backgrounder explores the impact of commercial/branded foods on the state of child nutrition, and discusses how farm-to-school programs have the potential to foster healthier dietary habits among schoolchildren and enhance community access to affordable food supplies. The document includes case studies and lessons learned from several farm-to-school marketing projects in California, Connecticut, Florida, Kentucky, New York and North Carolina. Published copies of the document may be ordered online for $12.00 (plus $4.00 for shipping and handling) from the Community Food Security Coalition web site at http://www.foodsecurity.org/memberinfo.html.

How Local Farmers and School Food Service Buyers Are Building Alliances; Lessons Learned from the USDA Small Farm/School Meals Workshop, May 1, 2000, Debra Tropp and Surajadeen Olowolayemo, Transportation and Marketing Programs, USDA Agricultural Marketing Service, December 2000, 30 pages.

This report summarizes the educational highlights of a technical workshop on farm-to-school marketing held in Georgetown, KY with the support of the Kentucky Department of Agriculture, the University of Kentucky’s Cooperative Extension Service, and USDA’s Agricultural Marketing Service and Food and Nutrition Service. Topics addressed in the report, based on presentations made at the conference, include the importance and benefits of farm-to-school marketing, product preferences in school food service, factors that influence vendor selection by school food service buyers, and case studies of successful farm-to-school marketing programs in California, Florida, Kentucky and North Carolina. Supplemental information offered in the report includes a section on available government assistance for farm-to-school programs, and a marketing checklist for farmers and school food service directors interested in getting involved in farm-to-school activities. Electronic copies of this free report may be retrieved from the USDA Agricultural Marketing Service’s Marketing Service Branch website at http://www.ams.usda.gov/tmd/MSB/PDFpubList/localfarmsandschool.pdf, and published copies of the report may be requested by contacting Debra Tropp, Team Leader, Market Channel and Postharvest Research and Development, Marketing Service Branch, USDA Agricultural Marketing Service by e-mail at Debra.Tropp@usda.gov or by telephone at 202-720-8317.


This report documents the successful efforts of a small minority-owned farm cooperative in northern Florida to create new markets for its agricultural production between 1997 and 1999 by delivering fresh-cut leafy green vegetables, fresh berries, and fresh melons to local school districts. Information supplied in the report includes valuable step by step insights as to how this cooperative was able to bring its strategic business plan to fruition by working collaboratively with individual school food service directors and local representatives of the Department of Defense’s Defense Subsistence Office. Electronic copies of this free report may be retrieved from the USDA Agricultural Marketing Service’s Marketing Service Branch website at http://www.ams.usda.gov/tmd/MSB/PDFpubList/localfarmsandschool.pdf, while published copies of the report may be requested by contacting Debra Tropp, Team Leader, Market Channel and Postharvest Research and Development, Marketing Service Branch, USDA Agricultural Marketing Service by e-mail at Debra.Tropp@usda.gov or by telephone at 202-720-8317.
Linking Farms with Schools: A Guide to Understanding Farm-to-School Programs for Schools, Farmers and Organizers, Marion Kalb, Kristen Markley and Sara Tedeschi, 2004

This guide details the benefits, challenges, and strategies for success for building successful farm-to-school projects and includes case studies of innovative projects and an extensive resource list. A useful guide for farmers, food service, and organizers, it addresses both purchasing and supply issues, as well as food safety, product cost, and developing programs in colder climates. Sample surveys for both food service directors and farmers are also included. Published copies may be ordered on-line for $7.00 (plus $4.00 for shipping and handling) from the Community Food Security Coalition web site at http://www.foodsecurity.org/memberinfo.html.

Local Food Connections from Farms to Schools, Mary Gregoire, Catherine A. Strohbehn and Jim Huss, Iowa State University Extension, 2000, 4 pages.

This pamphlet provides an overview of marketing and procurement considerations that often emerge when farmers attempt to market their farm products directly to local schools and offers recommendations for addressing these issues. Electronic copies of the pamphlet may be obtained for free from the website of Iowa State University’s Extension program at http://www.extension.iastate.edu/Publications/PM1853A.pdf

Lunch Matters, by Dona Richwine, Nutrition Specialist, Santa Monica-Malibu Unified School District, Santa Monica, CA

This video and companion booklet, showcasing the Santa Monica-Malibu Unified School District’s award winning lunch program, provides step by step instruction on how to start a farmers market salad bar in a school cafeteria. Addressed in the video and booklet are specific recommendations on how to successfully promote the concept of a farmers market salad bar with key school and community leaders, how to develop appropriate food purchasing and delivery procedures in cooperation with local farmers market managers, and how to calculate the amount of labor needed to operate an individual salad bar program. The booklet also includes several attachments that can be used as reference material by school food service personnel, including sample menus, a prospective equipment list, and examples of operational cost analyses, participation rate records and production records.

The video and booklet are available for a handling fee of $5.00 to school districts and organizations that wish to start a farmers market salad bar. To place an order, please contact Dona Richwine at richwined@smmusd.org.

Oklahoma Farm-to-School Report, Oklahoma Food Policy Council (joint project of the Kerr Center for Sustainable Agriculture, the Oklahoma Department of Agriculture, Food and Forestry, and Drake University), January 2004, 36 pages.

The content of this report focuses on the results of a survey sent to foodservice buyers at 638 public institutions in Oklahoma (such as public elementary, middle and secondary schools, colleges, universities and correctional facilities) to ascertain their level of interest in purchasing locally-produced foods. Survey questions examined the contractual arrangements most typically used to procure foods at Oklahoma’s public institutions, and the types of food commodities (produce, meat and dairy) most commonly purchased from both local and non-local sources. Researchers also sought to identify the primary issues that either encouraged or discouraged procurement of locally-produced foods by this foodservice segment, and
analyzed differences in purchasing behavior and preferences between larger and smaller institutions. Aside from containing an analysis of survey results, the report also contains background information on several successful farm-to-school marketing models, a nutritional profile of Oklahoma residents/households compared to the U.S. average, and a list of food items produced in Oklahoma. Electronic copies of the report may be downloaded for free from the Kerr Center for Sustainable Agriculture website at http://www.kerrcenter.com/ofpc/farmtoschool.htm, while published copies of the report may be ordered online from the Kerr Center at http://www.kerrcenter.com/HTML/pubform_farm_ranch.html for a $2.00 shipping and handling fee for the first copy, and a $1.00 shipping and handling fee for each additional copy.


This comprehensive web-based guide to enhancing school nutrition in school districts is the culmination of five years of research by the Center for Ecoliteracy and their project partners aimed at identifying the elements necessary to create integrated farm-to-school programs that incorporate nutritional, educational, community development, and environmental goals. Essays, interviews, tools and resources, divided into ten thematic chapters, are offered together to help a diverse array of stakeholders begin the process of envisioning and planning innovative school feeding programs that are designed to enhance the social and mental well-being of students, help improve student performance, and enable students and teachers to reconnect with their local communities in meaningful ways. Topics addressed by each of the guide’s individual training modules include:

- Leadership, Policy and Change
- Curriculum Integration
- Nutrition and Health
- Finances
- Facilities Design
- Dining Environment and Experience
- Professional Development
- New Models of Procurement
- Waste Management
- Marketing and Communications

One of the unique tools found in the guide’s Finances module is a downloadable financial calculator, which is designed to help food service directors obtain a clearer understanding of their expenses and revenue sources, and more accurately evaluate the financial impacts of incorporating fresh food and onsite meal preparation into school foodservice. The guide may be accessed electronically for free from the Center for Ecoliteracy website at http://www.ecoliteracy.org/pages/rethinking/rethinking-home.html.


This toolkit is designed to help parents, teachers, school administrators, elected officials and others improve the nutritional quality of foods and beverages in their local schools through grassroots advocacy. While the themes addressed in the toolkit encompass a far broader range of nutritional issues than farm-to-
school activities, most notably the issue of competitive foods (those sold or served outside school meal programs), it contains an abundant quantity of reference material of interest to individuals looking to establish farm-to-school programs in their communities. The toolkit is comprised of three sections:

- **How to Improve School Foods and Beverages**, which provides guidance on how to communicate messages related to improving child nutrition to decision-makers, and offers background information to illustrate how the growing influence of competitive foods in schools undermine the national investment in child nutrition programs
- **Model Materials and Policies**, which features examples of model legislation, sample letters, and other reference materials that can be adapted for use by individual communities
- **Case Studies**, which offers a comprehensive list of legislative and programmatic efforts to eliminate or reduce the presence of competitive foods in schools throughout the country

The School Foods Tool Kit may be downloaded at no cost from the CSPI website at [http://www.cspinet.org/schoolfood](http://www.cspinet.org/schoolfood), or may be ordered on-line via credit card for $10.00 US or $15 Canadian. To order a published copy of the toolkit by check or money order, interested buyers should download the publication order form from [http://www.cspinet.org/schoolfood/orderform_toolkit.pdf](http://www.cspinet.org/schoolfood/orderform_toolkit.pdf), and send the form plus check or money order for $10.00 US or $15 Canadian to CSPI’s School Foods Tool Kit
1875 Connecticut Avenue, NW, Suite 300,
Washington, DC 20009

“Taking it to the next level: Success of small Florida vegetable co-op leads to a network of similar cooperatives,” *Rural Cooperatives* magazine, U.S. Department of Agriculture, September-October 2002, 7 pages.

The article documents the recent business expansion strategies of the New North Florida cooperative, a small minority-owned cooperative based in Marianna, FL that received seed money from USDA in the late 1990’s to initiate and carry out farm-to-school marketing activities in value-added produce. By piggybacking on the distribution network of other cooperatives, the New North Florida cooperative has been able to develop new markets for its products in nearby States, as well as expand the customer base for other small farm cooperatives operating in Alabama, Arkansas, Florida, Georgia, Louisiana and Mississippi. Electronic copies of the article may be retrieved for free from the USDA Rural Development website, located at [www.rurdev.usda.gov/rbs/pub/sep02/sep02.pdf](http://www.rurdev.usda.gov/rbs/pub/sep02/sep02.pdf).


This manual provides an overview of the lessons learned during the operation of a “Farmers Market” salad bar program, featuring locally-sourced, seasonal fruits and vegetables, option, at selected schools in the Davis, CA Joint Unified School District over a two-year period. Designed to help school foodservice personnel and other key community stakeholders develop their own school-based “Farmers Market” salad bar programs, the manual focuses on the incremental steps involved in incorporating locally grown fresh fruits and vegetables into school foodservice menus. The first three chapters of the manual examine the
specific requirements of salad bar programs at each stage of development, including the start-up phase of program planning, fundraising and organization, the intermediate phase of program implementation, and the final phase of program expansion/institutionalization. Readers are also offered tools for assessing the “readiness” of school district participation in a farm-to-school program, and detailed guidance on how to assess the financial viability of a planned or ongoing salad bar program by generating profit/loss statements and calculating “breakeven” points for program operations. The manual concludes with a listing of resources for farm-to-school programs and food policy. Copies of the manual can be retrieved electronically from the SAREP website at http://www.sarep.ucdavis.edu/cdpp/farmtoschool/crunchlunch32003.pdf


This booklet describes the results of a pilot salad bar program initiated by Occidental College’s Community Food Security Project in the Santa Monica-Malibu Unified School District. It evaluates student participation rates in the Farmers’ Market salad bar program (featuring locally-grown farm products) versus alternative meal options at several elementary schools, analyzes the cost of implementing the program, examines various ways of boosting interest in salad bar programs from students, school personnel and community members, and discusses some of the budgetary and logistical challenges involved in maintaining a successful Farmers Market salad bar program.
Appendix A: Memo Regarding "Purchases of Locally Produced Foods" in 2002 Farm Bill

May 16, 2002

SUBJECT: Purchases of Locally Produced Foods in the School Nutrition Programs

TO: Regional Directors
All Regions
Special Nutrition Programs

Section 4303 of the Farm Security and Rural Investment Act of 2002 adds a new paragraph (j) at the end of section 9 of the Richard B. Russell National School Lunch Act pertaining to purchases of locally produced products. The provision requires the Secretary to encourage institutions participating in the school lunch and breakfast programs to purchase locally produced foods, to the maximum extent practicable.

We are asking you and your State agencies to encourage school food authorities participating in the National School Lunch and School Breakfast Programs to purchase locally produced foods, to the maximum extent practicable, along with other foods. This provision does not absolve school food authorities of their obligation to adhere to all applicable procurement requirements. School food authorities should be reminded that all purchases must be made competitively, consistent with Federal and State procurement laws and regulations. Purchases of this type would generally qualify as small purchases under procurement requirements and therefore may be procured using informal procedures. School food authorities should check with their administering State agency to determine appropriate small purchase requirements and with their State Department of Agriculture for more information on locally produced foods.

This is a good time of year to encourage the purchase of locally produced products and to encourage the planning for next school year’s purchase of such products. Most regions in the country have an abundance of locally produced fruits, vegetables, herbs and nuts to enhance the meals served to children. Additionally, studies by the U.S. Department of Health and Human Services, U.S. Department of Agriculture (USDA), and the National Academy of Sciences suggest that due to the phytochemical content of fruits and vegetables, as part of a diet that is low in fat, saturated fat and cholesterol and that contains plenty of whole-grain breads and cereals, may decrease the risk of heart disease and cancer. Since a variety of fruits and vegetable can be purchased locally, this fits into our overall goal of providing nutritious, well-balanced meals to children.

In the summer of 1997, USDA began a comprehensive effort to connect small farms to the school meal programs. The "farm to school" initiative encourages small farmers to sell fresh fruits and vegetables to schools and encourages schools to buy this wholesome
produce from small farmers. A copy of “Small Farms/School Meals Initiative”, a step by step guide on how to bring small farms and local schools together, is available to assist you in your efforts to purchase locally produced foods at www.fns.usda.gov/cnd/Lunch/SmallFarms/small.pdf.

If you have any question, please contact Mary Jane Whitney at (703) 305-2590.

STANLEY C. GARNETT
Director
Child Nutrition Division
Appendix B: Success Stories

Farm to School programs incorporate healthy, nutritious, farm products into school lunches, snacks and salad bars. According to established farm to school projects, farm fresh fruits and vegetables rank among students’ favorite meal options, especially in elementary and middle schools. When combined with nutrition education, farm visits, school gardens, and education in the classroom, children can develop healthy eating habits that will last a lifetime. In doing so, they can decrease the risk of experiencing food related diseases such as obesity, diabetes, hypertension and heart disease. Farm to School also enhances the local economy by providing a new outlet for locally-produced foods.

Here are some examples to generate ideas as you begin exploring Farm to School possibilities in your area:

California

A UCLA study conducted on a sample of 195 children from three elementary schools in the LA Unified School District revealed that the average fruit and vegetable consumption by children increased by one serving /day over a period of two years, a change attributed to the “Farmers Market Salad Bar” in the school cafeteria. The salad bar served fresh fruits and vegetables sourced from a local farmer’s market. Other significant nutritional benefits included a reduction in average calorie intake by 200 calories/day and fat intake by 11gm/day after the salad bar was introduced. Students enjoyed the fresh, healthy and tasty salads, increasing participation in the free and reduced meals offered through the National School Lunch Program. The project was facilitated by the Center for Food and Justice, Occidental College (then called Community Food Security Project) which also conducted farm tours, taste testings, and nutrition education sessions for students, teachers, and parents.

New Mexico

In New Mexico, local farms’ foods are featured throughout the menus in Santa Fe Public Schools. With the help of the project’s coordinator, who is a chef, the director of Student Nutrition Services was inspired to develop a farm to school program to help kids enjoy the flavor and quality of locally grown fresh fruits and vegetables. Starting in three schools, the program has now expanded to six elementary schools and one high school.

The state Department of Agriculture and the state Farmers Marketing Association located interested farmers. Approximately forty farmers sell to the school district, primarily through a farmers coop. Farm crops include salad greens, sunflower sprouts, apples, watermelons, cantaloupes, tomatoes, potatoes, onions, carrots, broccoli, corn, cucumbers, peppers, squash, sweet potatoes, pears and radishes. Most products are available only during spring and fall. However, salad greens grown under cover are now available throughout most of the winter. Sunflower sprouts are a big hit with the kids and are used district-wide, as are locally grown watermelons, apples, and sweet potatoes. Deliveries are made directly to the school sites or to the central warehouse.

Two of the elementary schools have a salad bar every day. Lunches at these sites include a meat entree three times a week and a vegetarian item twice a week. The other elementary schools offer a side salad of...
mixed greens, sunflower sprouts, and other seasonal items with lunch. The high school has a separate salad bar; students have the choice of the salad bar or a hot lunch.

Nutrition education in the classroom has had a positive impact on participation in the salad bar line. The Farms to Schools Coordinator facilitated discussions about proper salad bar etiquette as well as what is required for a reimbursable meal under the National School Lunch Program. Food service staff brought the salad bar into the classroom for a hands-on lesson about food groups and portion sizes. The students were then able to prepare a lunch from the salad bar, practicing what they learned.

New York

In New York State, the Cornell Farm to School Program supports and monitors pilot projects in two school districts and works with many other constituencies to further farm to school efforts and increase awareness of and support for farm to school activities in New York. A prime focus has been on building statewide coalitions and increasing awareness through communication about farm to school and providing resources to enable the initiation of additional projects. In Hannibal and Johnson City, the two pilot project school districts, food service directors have purchased greater amounts of local produce in each succeeding project year. During school year 2001-02, Hannibal purchased $3,724 worth of 12 different NY-grown produce items. In school year 2002-03, Hannibal purchases increased to $3,912.45 worth of 21 different items. Johnson City purchased $1,522.45 worth of six different produce items during school year 2001-02, and $1,637.25 worth of eight different items during school year 2002-03.

Food service directors and staff members emphasize that the produce from local farmers is of excellent quality and taste, and competitive in price. In Johnson City, the director buys directly from one farmer; in both districts, directors are also able to obtain local items through their produce brokers. During the fall months, apples, pears, plums, watermelon, tomatoes, broccoli, cauliflower, onions, peppers, cucumbers, cabbage, carrots, potatoes, and lettuce are served to students. Although vegetables were previously bought chopped and bagged, the directors agreed to buy whole New York grown cauliflower and broccoli and chop them in-house. New York cabbage, onions, apples, and dried kidney or black beans are also purchased during the winter months.

A New York State Farm to School Law, is making it easier for schools to purchase local products. The law established an annual NY Harvest for NY Kids week which takes place every fall and connects students to farms through visits to farms and farmers’ markets, meals featuring NY foods, and other farm-school activities. The Johnson City and Hannibal schools, as well as many other schools throughout the state, participate in NY Harvest for NY Kids week.

A Statewide Farm to School Coordinating Committee, established in 2003, provides statewide leadership for farm to school initiatives, established and implements short- and long-term goals, identifies needs, and develops strategies for making sustainable farm-school connections. The committee includes wide representation from commodity organizations, state departments of health, education, and agriculture, community food and agriculture organizations, food service associations at K-12 and college levels, and cooperative extension associations. An active NY Farm to School Listserv enables members to share experiences, ideas for programs and activities, recipes, sources for NY products and much more. See the Cornell Farm to School Program website (www.cce.cornell.edu/farmtoschool) for many more details about these efforts.
Wisconsin

Madison Metropolitan School District is in its second year of offering a farm to school program in three of its elementary schools. Thanks to the food service coordinator’s determination, the program continues in spite of the challenges implementing farm to school in a large school district. Wisconsin’s program began as a pilot project initiated through the University of Wisconsin-Madison, integrating classroom education, farm visits, Wisconsin-grown products offered in the cafeterias, parent newsletters, and special festival dinners involving the whole school.

In addition to working with farm co-ops, the child nutrition director has encouraged more farmers to participate in the DoD fresh produce program. Because the district needs produce that is pre-washed, pre-cleaned, pre-cut, etc, the biggest challenge is finding processors who can provide produce in that form. In spite of the challenges, the director wants to expand the program, hopefully by extending the grant for another two years. She has noticed that students who are reluctant to taste vegetables are more willing to accept them in the schools that feature the education program.