



<p>Meeting Minutes: SD County Farm to School Taskforce May 17, 2013, 11a.m. - 12:30p.m. Santee School District 9625 Cuyamaca St., Santee, CA 92071</p>	<p>Next Schools & After-School Subcommittee Meeting:</p> <p style="text-align: right;">SD County Farm to School Taskforce Tour of Sunrise Farms & Packing House Friday, August 16, 2013 9 – 11:15 a.m.</p>
<p>Attendees: <i>Institutions:</i> Trieste Chiquete (Coronado Unified School District), Taryin Casillas (Lemon Grove School District), Judi Reynolds (Escondido Union School District), Emily Cena (Poway Unified School District), Mark Mendoza (Chula Vista Unified School District), Anna Thompson (Lemon Grove School District), Robin McNulty (Lemon Grove School District), Greg Harms (Poway Unified School District), Jon Hansen (National School District), Jeff Landers (Chula Vista Unified School District), Naomi Shadwell (Oceanside Unified School District), Marlene Tuft (San Diego Sheriff’s Department), Vanessa Zajfen (San Diego Unified School District), Eric Schoeppler (San Diego Unified School District)</p> <p><i>Growers/Vendors:</i> Steve Bailey (Rancho J’Baile), Al Vandendrese (American Produce)</p> <p><i>Community Partners:</i> Parke Troutman (SDHC), Ashley Cassat (County of San Diego HHSA), Dwight Detter (Whole Foods Market), JuliAnna Arnett (Community Health Improvement Partners/ SD County Childhood Obesity Initiative), Romalyn Watson (HHSA East Region), Elizabeth Vaughn (Community Health Improvement Partners)</p> <p>Recorder: Madeline Cross (CHIP/COI)</p>	

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Welcome & Farm to School Updates	<ul style="list-style-type: none"> • Trieste led the welcome and introductions. 	
Update & Discussion: Distributor Showcase & Powerpoint	<ul style="list-style-type: none"> • JuliAnna provided a general overview of the “Let’s Go Local!” Produce Showcase: <ol style="list-style-type: none"> 1. The purpose of the showcase was to create one-on-one opportunities for growers and distributors to share local produce options with school food services. 2. General Stats: 104 attendees; 6 distributors, 9 growers, 22 districts, 20 government and nonprofit 3. Media coverage – 6 media outlets (County Television Network, KECR, KPBS, KUSI, Union-Tribune, Univision) covered the event. 4. Evaluations: 21 turned in surveys (approx 25% of participants). Overall satisfaction for the 	



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	<p>event was ranked good to excellent. General evaluation highlights included:</p> <ul style="list-style-type: none"> ▪ Most believed that the ability of the growers and distributors to serve farm to school needs was excellent to good ▪ Potential Sourcing/Sales connections (e.g., connections that might lead to sales) were mostly good to excellent ▪ Event resources were mostly good to excellent ▪ Survey respondents were asked to rank the likelihood of the connections made to advance farm to school. On a scale of 1 to 10, 10 being very likely most ranked their connections as a 9 or 10. ▪ General comments: Most enjoyed the in-person networking. The main suggestions for improvements related to the sound system and chairs if we are too have speakers again. <ul style="list-style-type: none"> • General thoughts: <ol style="list-style-type: none"> 1. Mark Mendoza- Thinks the showcase went really well. He personally got 3-4 contacts from showcase. He wants to make sure he maintains a good relationship with Diamond Jack's as he pursues contacts. 2. Sally Spero- The positive comments were all about connections. The negative comments were focused on the facility which can all be easily fixed. 3. Jon Hansen- The event was a good momentum builder. He asked that the list of contacts and produce availability be sent out again and suggested the speeches be kept to a minimum at the next showcase. 4. The question was How can we keep the momentum going to keep the contacts talking <ul style="list-style-type: none"> ▪ Map of districts and their needs should be sent to the growers. JuliAnna to let growers know that baseline survey is coming with important information. Planning on sending out the baseline survey to each • Subcommittee will meet one more time and discuss what to improve for future showcases 	<p>JuliAnna to resend Let's Go Local Contact List (Done)</p> <p>JuliAnna to let growers know that a baseline survey is coming and will contain important information.</p> <p>Planning Committee will meet once more to discuss improvements for future showcases.</p>
<p>School District Updates</p>	<ul style="list-style-type: none"> • Lakeside Union School District- LUSD has adopted harvest of the month programming. They have doubled the amount of fruits and veggies they have purchased in the last year. • Lemon Grove School District- LGSD held a cooking class for F2S club kids and parents with Chef Jeff Rossman from Terra American Bistro. The foods students liked the most will be served on next year's menu. LGSD has been testing a lot of recipes and conducting a lot of taste tests, including a school wide Kale chip taste test. LGSD has also adopted the Harvest of the Month program and a fresh fish taco day. LGSD also has an active garden program. • Santee School District- Santee recently held a farmers' market with its students where they were able to 	



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<p>Procuring Local Foods for Child Nutrition Programs Kacie O'Brien Program Specialist, Western Regional Office, USDA</p>	<p>learn about and taste new foods. There was also a fiscal education component to the farmers' markets as students were allowed to "purchase" product from the farmer.</p> <ul style="list-style-type: none"> • Kacie O'Brien with the USDA presented to the group on procuring local foods for Child Nutrition Programs. • There are two types of procurement methods district's can use to acquire product: formal or informal. This is typically determined by whether the purchase a district is making meets or exceeds \$83,400, the State's current small purchase threshold. (Note: individual districts may have a small purchase threshold lower than this amount that food services need to comply with.) These methods include: <ol style="list-style-type: none"> 1. Formal- There are two types of formal bids: <ul style="list-style-type: none"> ▪ Sealed Bids (IFBs)- This process includes a district's desired products. Solicitations are awarded by determination of which vendors are responsive and responsible (i.e., vendors responded to all of the requirements of the bid and can capably comply with its requirements) and lowest price. ▪ Competitive Proposals (RFPs)- This process is used when the district is looking to acquire services and/or may not be quite sure exactly how to acquire the service/product they are looking to receive (i.e., they want the vendor to provide them insight on how to best accomplish their request). Solicitations are awarded based on a variety of factors specified in the proposal (e.g., price, specific service requests, specific product requests). The proposals must spell out the districts requests, make clear the bid evaluation method, and not restrict open and free completion. Both processes require districts to publically advertise their bids. 2. Informal- The informal process can be used for purchases under \$83,400 as long as the district allows. This process simply requires districts to acquire three price quotes to determine the best vendor in which to make a purchase. • She stressed the importance of competition stating it is essential to school food services receiving products and services for the best cost. She also noted that districts cannot simply divide purchases to fall below the small purchase threshold. The characteristics of the products desired must justify the need to separate the purchase from other food procurement. • Geographic Preference- The 2008 Child Nutrition Reauthorization Act allowed for the inclusion of geographic preference in the solicitation process. This preference can be applied to unprocessed agriculture products (i.e., agriculture products that retain their inherent character such as refrigerated, peeled and chopped, dehydrated product), but not heated products. You, School Food Authorities, have 	



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	<p>the authority to define local. You can define it by mileage, region, state, county, etc. You can also define local differently for different products.</p> <ul style="list-style-type: none"> • Districts may use geographic preference by: <ol style="list-style-type: none"> 1. defining local, 2. determine amount of preference local product will receive, 3. outline in your solicitation how you will assess and evaluate proposals that include local product <p>Kacie specified that districts can give preference to local product by deducting a specified number of cents or deducting a specified percentage from the cost of a product. THIS DOES NOT AFFECT ACTUAL PRICE. It is simply used for determining the winning bid.</p> <ul style="list-style-type: none"> • Kacie outlined other actions districts can take to source local product: approaching only local sources under an informal procurement, including your desire for local products in solicitations, choosing local foods in the DOD fresh catalog, including specifications in your solicitation that support local products. She mentioned that you may already be unintentionally sourcing local product if your distributor purchases local so make sure to check with your distributor about where they purchase their product. • You can also include specifications in your solicitation process for local product. These specifications can require that products have a certain degree of ripeness/maturity, freshness (age), condition upon receipt, “organic”, “no-till”, “no-spray”, type of products, etc. You can identify certain types of products that are grown in your region as long as this doesn’t restrict competition. (Exmp: If only one grower in your region in your area grows that product and you wrote the solicitation to accommodate them that would be restrictive, but if three growers produce that product that would not be considered too restrictive.) • FNS staff are able to help you source local. SD County currently has two USDA grantees. Contact Kacie O’Brien if you have any questions or need assistance with local procurement. 	<p>JuliAnna will send out the PowerPoint, existing memos for geographic standards, and existing training documents on local preference.</p> <p>Food Services contact Kacie O’Brien with the USDA if your district needs help navigating or fully utilizing local procurement opportunities. Contact Kacie at: Kacie.O'Brien@fns.usda.gov.</p>
<p>F2S Contractual Language</p> <p>SDUSD Eric Schoeppler, Senior Buyer & Vanessa Zajfen, Farm to School</p>	<ul style="list-style-type: none"> • San Diego Unified School District <ul style="list-style-type: none"> ○ Vanessa provided a brief overview of SDUSD’s farm to school program. The program currently includes local sourcing for their meals, Harvest of the Month, the provision of “No-Cook” Cooking Carts for classroom education, and garden to cafeteria. To date, SDUSD has sourced over a million dollars of local product. ○ SDUSD is working to institutionalize farm to school in its contracts. SDUSD recently released a solicitation for products grown within 25 miles of San Diego County’s border line. (This process falls under the informal bid process.) In addition, its recent solicitation for fresh product included an entire section dedicated to local product. 	



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<p>Specialist</p> <p>PUSD</p> <p>Greg Harms, food & Nutrition Procurement Specialist</p>	<ul style="list-style-type: none"> ○ Eric provided more detail on SDUSD’s Fresh Product RFP. SDUSD set a goal to source 15% of its product local. Since SDUSD is such a large district, the help of its distributors was much needed to meet this goal. Prior to releasing their RFP, SDUSD interviewed five vendors to gather their input on the inclusion of local product in the contract language. There was no issue with restricting competition. ○ SDUSD created a hybrid IFB/RFP based on its vendor conversations. The solicitation uses cost as a major decision-making criterion, but also considers a few other factors, including locality. The Food Services Department worked closely with their legal and contractual dept. to include locality in its solicitation. SDUSD did not use “geographic preference” as defined by the USDA in its solicitation. They used an evaluation structure recommended to them by the vendors they interviewed. ○ The bid has three major sections: processed product, whole foods, local foods. The local foods section includes SDUSD’s three-tiered definition of local and preferred farming practices it prefers to support. The RFP also requests that all bid proposers: <ul style="list-style-type: none"> ▪ Identify the names of the farms they work with and list sample products ▪ Work with growers that can meet the vendor and district’s delivery and product requirements, including grading, packing standards, and product variety ▪ Work with growers that can offer experiential educational opportunities (e.g., farm tours) ▪ Provide a cost structure for locally sourced items (per case fee in addition to the product, percentage mark-up over product cost, fixed cost, etc.) ▪ Track and provide data on the amount and type of local product being sourced ▪ Provide grower invoices (actual amount paid) to support transparency and fair pricing ● Poway Unified School District <ul style="list-style-type: none"> ○ Greg stated that PUSD’s biggest concern is that all producers carry \$1 million/\$2 million aggregate. PUSD will not source from anyone that does not meet this requirement. ○ For the first time, PUSD included a farm to school provisions in its 2012 solicitation. PUSD was just launching its farm to school efforts at this time and were not sure the direction they would take the program, but wanted their contract to provide them some flexibility to determine this over the school year. Their contract includes three sections/specifications related to local foods: <ul style="list-style-type: none"> ▪ Harvest of the Month (Section 20)- the solicitation states that they plan to implement a HOM program. They will communicate their HOM schedule to vendors to source product. 	<p>Contact Eric Schloppler about questions related to SDUSD’s solicitation bids at eschloeppler@sandi.net.</p> <p>Contact Greg Harms about questions related to PUSD’s contract at gharms@powayusd.com.</p>



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	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ▪ Farm to School Program (Section 21)- The district reserves the right to develop quotations for unprocessed locally grown and locally raised fruits and vegetables. District can also make local purchases if the prices of product are favorable to the district. ▪ Definition of Local (Section 22)- The contract includes a three-tiered definition of local: San Diego Local (25 miles from County line), Southern California Local Farmers (200 miles of District), and Regional Farmers (California grown). ○ Greg mentioned that they didn't evaluate the contract based on the local specifications. ○ PUSD did include a three month pricing lock on product prices provided as part of the proposal. ○ PUSD uses the informal bidding process to make its local food purchases. ○ Greg suggested a couple tips when sourcing local product. (<i>First, he mentioned that PUSD has seen a spike in participation on Farm to School Days. Food 4 Thought is PUSD's primary source for farm to school products.</i>) If you have a contract with a vendor and have reserved the right to seek quotations from other growers/distributors for product, the product you gather solicitations for must be different than the product you are receiving from your current vendor. These variances however can be slight. For example if you are purchasing apples from your current vendor, solicit black apples, a product available regionally, but not an item purchased through their existing distributor. You cannot have multiple contracts for the same product. • Contract Question & Answers (The groups asked clarifying questions about the PUSD and SDUSD's solicitation process. The final responses are listed below.) <ul style="list-style-type: none"> ○ Can you purchase variations of the same product from multiple suppliers?- Greg clarified that you can have more than one supplier as long as they are providing you different product (Vendor x provides apples. Vendor z provides peaches.) or the same product, but different variations. (Vendor x provides red apples. Vendor z provides black apples.) ○ How many districts will be releasing a produce bid for the 2014-2015 school year? 4 ○ How many of you are interested in including local preference language in your solicitations? Districts shared different opinions on the inclusion of geographic preference in contract language. There were districts that were interested, wanted more information, and preferred to ask their vendors outside of the solicitation process. ○ What if a district wants to support a specific grower? The USDA requires that school food authorities utilizing the informal bid process receive at least 3 price quotes before making a final determination on which vendor to choose. In the case that a grower contacts you about purchasing a local product, school food authorities still need to contact two (2) other growers 	



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	<p>to compare pricing and product availability.</p> <ul style="list-style-type: none"> ○ Where does it say that you have to solicit three bids? 7 CFR 3016.36 (d) <i>Methods of procurement to be followed.</i> (1) Procurement by <i>small purchase procedures.</i> Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the simplified acquisition threshold fixed at 41 U.S.C. 403(11) (currently set at \$100,000). If small purchase procedures are used, price or rate quotations shall be obtained from an adequate number of qualified sources. <p>It is School Policy Memo 18-2011, <i>Geographic Preference Q&As</i>, Question 9, that give FNS guidance that it is best to obtain at least 3 price or rate quotations when using the informal bid procedures. See here: Q9: An SFA would like to conduct a procurement under the small purchase threshold. Can the SFA procure unprocessed locally grown or locally raised agricultural products directly from a local farmer? A: Yes; however, the procurement must be conducted in a manner that maximizes full and open competition. According to the Federal regulations, the SFA can conduct a procurement under the small purchase threshold if the procurement is under \$100,000 in value. States or localities may set a lower small purchase threshold and thereby impose more formal procedures. The SFAs should put the number, quality and type of goods in writing before contacting any potential offerors. When using the small purchase threshold, we recommend that at least three sources be contacted who are eligible, able and willing to provide the unprocessed locally grown or locally raised agricultural product. Contacting a minimum of three sources ensures that an adequate number of potential offerors will be afforded the opportunity to respond to the solicitation.</p> <ul style="list-style-type: none"> ○ If only one vendor that sells particular item, you have to document that you were not able to buy it from any one else. If this purchase becomes regular then you need to be careful of that and look into other bids. But if it's a one time, fruit of the month type thing then only need to document that you were unable to find any other vendor for that product. ○ Kacie reiterated that SFAs cannot get rid for need for competition ● Additional contract questions can be directed toward Kacie or JuliAnna. 	<p>Food Services contact Kacie O'Brien with the USDA if your district needs help navigating or fully utilizing local procurement opportunities. Contact Kacie at: Kacie.O'Brien@fns.usda.gov.</p> <p>JuliAnna to also send out links for the SDUSD and Poway's contracts.</p>
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