

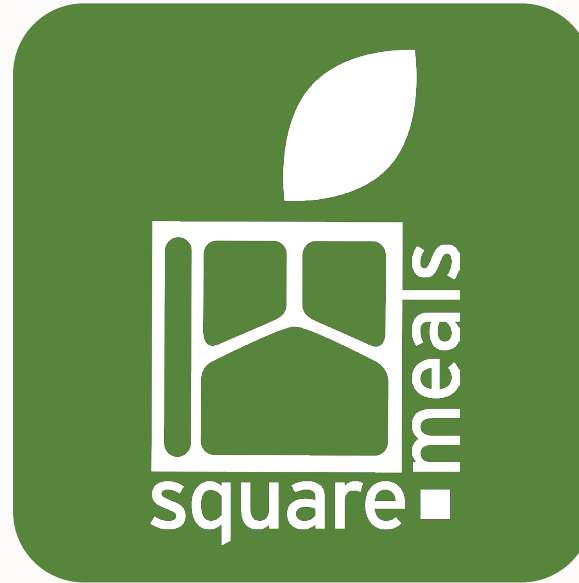


FRESH TRAYS

A Farm Fresh Curriculum



TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER



Advanced Local Procurement Training

MegaCon 2026

Texas Department of Agriculture

Food & Nutrition

2026 Farm Fresh: Fresh Trays Training



WELCOME



Module 1: Welcome & Introduction



Module 1 Objectives

By completing module 1, you will be able to:

1. Identify the goal and objectives of the training.
2. Recall the Farm Fresh initiative and its added value and benefits.
3. Describe the relevance of the training to your professional improvement and your program recipients.



Getting Started

General Information

- Sign in sheet
- Handouts & resources
- Breaks & restroom location

Group Norms & Participation

- Full participation
- Minimizing distractions
- Active listening
- Tolerating differences in opinions

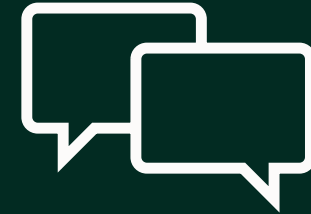


Introductions & Icebreaker



Jacob Korir
Farm Fresh Specialist
Texas Department of Agriculture
Food & Nutrition

Over To You!



1. Name
2. Organization
3. How long have you been in school nutrition, community programs, or food distribution programs?
4. If you were a fruit, what would you be?



Acknowledgement Statement

You understand and acknowledge that:

- The training you are about to take does not cover the entire scope of the program; and that
- You are responsible for knowing and understanding all handbooks, manuals, alerts, notices, and guidance, as well as any other forms of communication that provide further guidance, clarification, or instruction on operating the program.

Modules



Welcome & Introduction

Local Procurement

Geographic Preference

Written Procurement Procedures

Resources & Next Steps

Training Materials



Handouts & Materials Overview

- 1. Assessments**
 - Training survey
- 2. Handouts**
 - Notebook
 - Menu
 - Recipe
 - Checklists
- 3. Links to additional resources**
 - TDA
 - USDA and other organizations
- 4. Follow-up action plan**





Questions?



- <https://app.smartsheet.com/b/form/99abb40ec52f41779b059baf4b124ea7>

Farmers,
Ranchers, &
Educators
Serving
Healthy
Texans &
Reconnecting
Agriculture to
Youth in
Schools

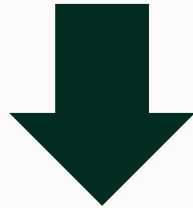
Fresh Trays Overview

Grant Objectives

1. Expand farm-to-program activity among institutions participating in Child Nutrition Programs.
2. **Provide TA** to participating institutions with procuring and using locally produced foods and providing agricultural education for students.

Training Goal

Help contracting entities launch or expand local purchasing efforts



Supporting producers while increasing farm to program activity in schools and communities

Training Objectives

1. Increase knowledge and understanding of local procurement policy and procedures.
2. Gain practical skills to help increase the number of local foods purchased.
3. Increase engagement in farm to program activities and agricultural education for students with resources from TDA.

USDA Key Areas

- 2400 (Purchasing/Procurement)
- 4000 (Communications and Marketing)

USDA Professional Standards Codes

- Product Specifications 2410
- Bid Solicitation and Evaluation 2420
- Food and Supplies Order 2440
- Program Promotion: 4120



Why Local Foods?

Participants encouraged to make healthier choices

Increased awareness of where food comes from leading to better engagement in Farm to Program activities

Local procurement supports local farmers

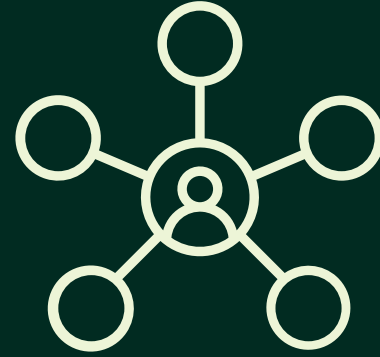
Builds resilient supply chains, increase competition, support equitable food systems and strengthen economy

Training Relevance Recap

Clarity and efficiency

Proactive mindset

Effective compliance



Provide guidance and tools to strengthen local procurement policies and procedures and thus improve clarity, proactiveness and ensure effective compliance by CNPs

Module 2: Local Procurement



Module 2: Local Procurement



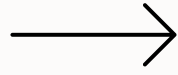
Module 2 Objectives

By completing module 2, you will be able to:

1. Identify steps you should take before you begin the procurement process.
2. Define local in a way that suits your needs.
3. Identify meal components that qualify for local procurement.
4. Identify and source regional producers and distributors.

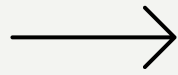
Getting Started with Local Procurement

Talk with neighboring programs



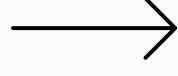
Are other nutrition programs in your region currently buying local foods?

Talk with your current distributor



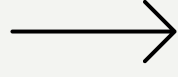
What products does your distributor provide from local sources?

Use the Farm Fresh Network map



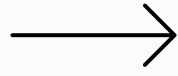
Learn about what products are available each season in your region

Conduct a menu audit



To see what you could swap out for local fresh products, based on what is available and achievable

Upcoming special events



Think about upcoming special events and ways to celebrate Texas agriculture



Which Meal Components Qualify?

All Meal Components Qualify!

- Meat/Meat Alternatives
- Fruits
- Vegetables
- Dairy
- Grains
- Herbs and Condiments



Unprocessed locally grown or raised agricultural products mean those agricultural products that retain their inherent character.

A vertical decorative bar on the left side of the slide, featuring a grid of food-related icons in various shades of green and yellow. The icons include leaves, a lemon slice, a carrot, a pea pod, a cherry, a pepper, and a lightbulb.

Important Considerations on Dietary Requirements and Meal Patterns

CE should:

1. Plan and prepare standardized recipes and cycle menus to meet all requirements consistent with meal pattern requirements.
2. Meet the USDA meal patterns using the quality of foods described in the solicitation document and subsequent awarded contract.
3. Serve a lunch, breakfast, and/or snack that meets meal pattern or milk specifications as required by the program.
4. Consider program participant's food preferences.
5. Plan meals to accommodate students requiring special diets, including food allergies.

- *Refer to meal patterns and dietary requirements guidelines to ensure these requirements are met*



Defining Local and Targeting Local Products

Why Define Local?

- Defining local helps you understand market availability and write solicitations with market conditions in mind
 - Allows you to track purchasing and create benchmarks
 - Allows you to use Geographic Preference for purchasing
- CEs may adopt definitions in use by State Agencies, but they can define local, however they see fit (***no Federal definition of local***)

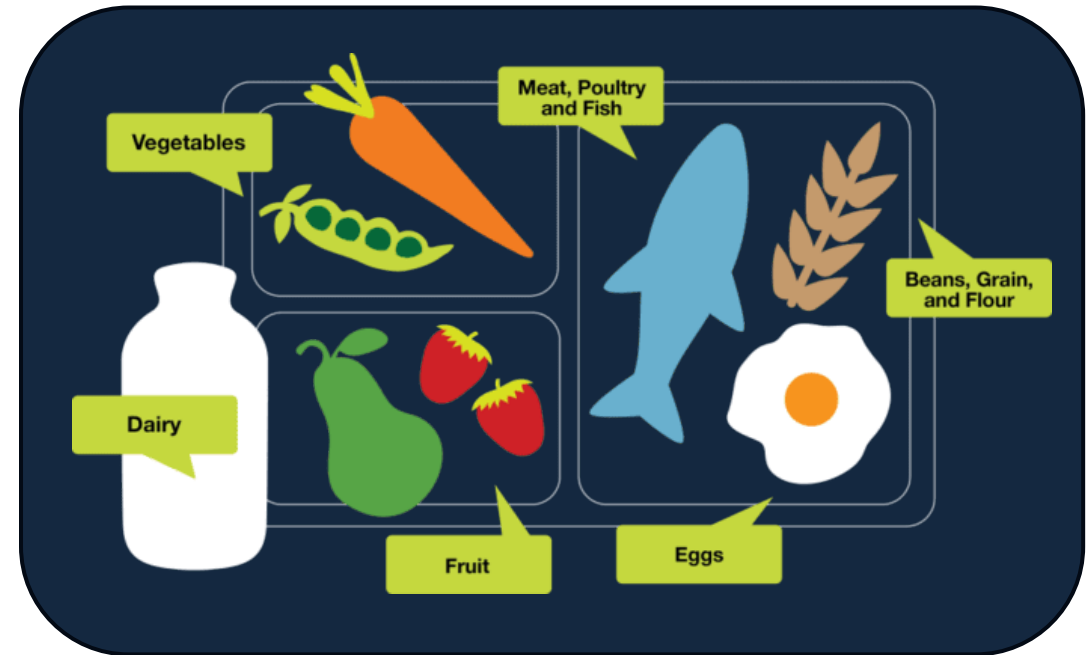
What is Local? It Depends!

CEs define for themselves what “local” means.

Possible definitions of “local”:

Produced within a:

- 20-mile radius
- 50-mile radius
- 100-mile radius
- 200-mile radius
- within the county
- within the state
- within the region



Local can span the whole plate , including all meal components

Technical Requirements to Target Local Products



- Varieties unique to your region
- Freshness (e.g., delivered within 48 hours)
- Size of farm
- Farm practices (grass fed, cage free, biodiverse)
- Harvest techniques (no-till)
- Crop diversity
- Origin labeling

A vertical decorative bar on the left side of the slide, featuring a grid of food-related icons in various shades of green and yellow. The icons include leaves, a lemon slice, a carrot, a pea pod, a cherry, a pepper, and a pear.

Sources of Local Food in Texas

CE's Can:

Buy directly from producers

Rely on third parties to source, process, and deliver local foods

Purchase fresh produce through:

- Producer co-ops and food hubs
- Distributors and FSMCs
- Food processors
- School gardens

Texas National Ranking in Food Production

Texas is a nationwide leader in the production of many agricultural products

97% of Texas farms and ranches are family farms, partnerships, or family-held corporations

#3 in the nation for cattle and calves

#3 in the nation for milk and milk products

#5 in the nation for broiler chickens

#13 in the nation for fruits and nuts

#14 in the nation for fresh vegetables and melons

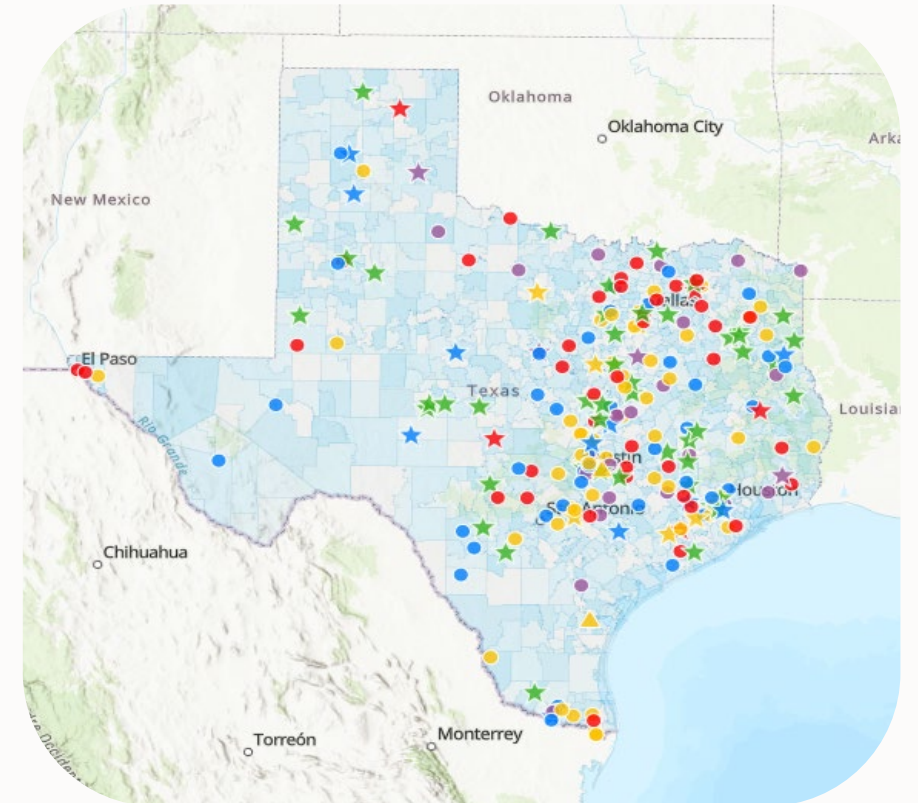
#10 in the nation for wheat

Source: USDA ERS farm income and wealth statistics (2024) cash receipts by commodity state ranking



Finding Local Food in Texas

- Farm Fresh Initiative's Farm Fresh Network Map
- The Farm Fresh Network
 - The bridge between TX farms/ranches & federal child nutrition programs
 - www.FarmFreshNetwork.org
 - Over 230 members registered
 - Search the map/listing to find:
 - Product availability
 - Seasonal availability
 - Distribution area
 - Contact information



Farm Fresh Network Map Exercise



- Scan the QR code to gain access to the Network Map
- Look up your district and locate the producer nearest to you

<https://experience.arcgis.com/experience/c8f3e664cb3b40a59f399ac6f35f6009>



Check out our Farm Fresh Network webinar for a tutorial on the new features!

<https://www.youtube.com/watch?v=7mY1VWWEY2s>



Finding Local Foods in Texas

Other Avenues & Sources

DOD
Fresh

USDA
foods

Co-ops

Food
hubs

Finding Local Foods in Texas

Other Opportunities

Farm Fresh
Challenge &
Taste testings

TDA & AgriLife
networking
sessions

Farm tours

Local
cooperative
extension agents

Menu Planning

The menu is the driving force in the procurement process!

Exploring options for substituting ingredients and developing new recipes to incorporate local food

- Which local foods will be most popular among students?
- Which local foods are already on your school menu?
- What is the school's budget for local products?
- Will the school develop new recipes to highlight new products or will it make simple swaps?

Menu and Recipe Review Exercise

Examine the weekly menu and recipe provided

- Identify 5 food products you could source locally on this menu and recipe
- Identify 1 new local product you can incorporate in the menu
- Identify items you would anticipate, or have experienced, challenges procuring locally





Cost Analysis & Forecasting

Forecasting includes assessing:

- Past purchases
- Current prices and trends for the same or like goods
- Student enrollment, current and projected
- Student average participation, current and projected
- Available and future product storage
- Velocity reports
- Established schedule of purchasing to maximize competitive pricing

Forecasting ensures development of a solicitation that includes accurate specifications and technical requirements

Farm-to-Program Purchasing Checklist

- A complete checklist that enables operators to build relationships and purchase from local farmers

[Farm-to Program Local Purchasing Checklist.docx](#)



FARM-TO-PROGRAM CHECKLIST

A guided checklist for Texas Child Nutrition Programs working with local farmers.

1. Identify Product Needs

- Clear planning helps ensure realistic expectations when engaging with a farmer. Review your menu and identify product needs:
- Select items for local purchasing
- Estimate quantities and purchasing frequency
- Determine product form (whole / washed / chopped / bulk-packed)
- Use Harvest of the Month (HOM) for seasonal Texas items and identify Farm Fresh Network (FFN) members offering HOM products

- Locate the checklist handout
 - List three things that are new to you in the checklist
 - Based on your situation, list three priority considerations you keep in mind when working with local farmers

Building Relationships and Reducing Risk

Building relationships

- Plan ahead - communicate needs early as growing seasons and quantities vary
- Work with local extension offices as they know the community and what vendors are available
- Texas Farm Fresh Network is a helpful resource to find local producers in your area
- Food hubs can provide local products from various farmers
- Constant communication is necessary to build lasting partnerships

Reducing risk in local procurement

- It is extremely important to be prepared!
- Discuss non-delivery scenarios (inclement weather, crop failures) with vendors
- Are backup options available?
- Identify alternative sources (other local producers, food hub, local distributor)



Additional Considerations for CACFP

“Institutions”

- Sponsoring organization which enters into an agreement with the State agency
- Must follow Federal procurement regulations, even when using non-program funds to purchase meals

“Facilities”

- Sponsored sites (day care homes, affiliated centers, or unaffiliated centers) participating in CACFP that do not enter into a direct agreement with State Agency
- Not required to follow Federal procurement regulations. However, conducting competitive procurements is encouraged as doing so upholds full & open competition

- CACFP providers can define “local” however they choose
- Sources and strategies for targeting local products discussed throughout this presentation apply to CACFP
- Must consult CACFP Handbook

Key Points to Remember

1

Definition of local can vary and is defined by the CE (there is no federal definition of local)

2

All meals components basically qualify

3

There are many models for providing local foods to your program

4

Utilize resources such as Farm Fresh Network and local extension offices

5

Cost analysis and forecasting is essential in ensuring that solicitations include accurate specifications

6

Planning ahead and regular communication is key to address changing needs





Questions?



- <https://app.smartsheet.com/b/form/99abb40ec52f41779b059baf4b124ea7>

Module 3: Geographic Preference



Module 3: Policy & Procedures - Geographic Preference



Module 3 Objectives

By completing module 3, you will be able to:

1. Define the expanded USDA geographic preference.
2. Explain when to apply various geographic preference strategies.

USDA Geographic Preference Option

(Expanded 7/1/2024)

Reminders

CEs define “local” and scoring advantage points or credit.

The definition should not interfere with “full and open” competition.

It applies to the source of the product.

CEs have the option to apply a “geographic preference” for the purchase of unprocessed locally grown, raised, or caught agricultural products.

The geographic preference option includes two procurement strategies:

- **Strategy 1:** Use the terms “locally grown”, “locally raised”, or “locally caught” in the bid specification (must be met).
- **Strategy 2:** Use a defined scoring advantage (e.g., additional credit or points given during the evaluation of responses to a solicitation).

A CE can also choose to:

- Adopt a mix of both strategies; or
- Elect not to use any of these approaches.

What Local Products Apply Under Geographic Preference?

Examples of allowable products include, but are not limited to:

- **Dairy** (includes pasteurized, unflavored)
- **Eggs** (including whole, shell)
- **Fruits** (including sliced, diced, whole raw, dried, or frozen products)
- **Vegetables** (including sliced, diced, whole raw, dried, or frozen products)
- **Grains** (including quinoa, rice, barley, etc., in whole form and other grains in ground form such as flour)
- **Meats** (including fresh or unprocessed frozen products and formed products, such as patties, that contain no additives or fillers)
- **Poultry** (including whole, form, or various cuts)
- **Fish** (including whole, form, fillets, or nuggets that contain no additives or fillers)

A vertical decorative bar on the left side of the slide, featuring a grid of stylized food icons in green and yellow tones. The icons include various fruits and vegetables like apples, lemons, carrots, and beans.

Allowable Food Handling and Preservation Techniques

- Addition of ascorbic acid or other preservatives to prevent oxidation
- Butchering livestock and poultry
- Cleaning fish
- Cooling
- Drying or dehydration
- Forming ground products into patties without any additives or fillers
- Freezing
- Packaging
- Pasteurization of milk
- Refrigerating
- Size adjustment made by peeling, slicing, dicing, cutting, chopping, shucking, and grinding
- Vacuum packing and bagging
- Washing

Heating and canning are not allowed.

NB: Unprocessed locally grown, raised or caught agricultural products mean those agricultural products that retain their inherent character.



Geographic Preference Strategy 1

Using Local Terms in Bid Specification

Used when only locally unprocessed products are acceptable

- Includes a definition of “local” within a specific geographical area.
- Operator is required to draft clear specifications - including language that the product must be locally grown, raised, or caught (within a specific geographical area).
- Vendor products **MUST** meet criteria for award.
- Market research is critical to avoid limiting competition.
- If less than 3 vendors meet the criteria then widening the definition of local may be helpful.

Geographic Preference Strategy 1 Example

Using Local Terms in Bid Specification

A school usually buys whole apples for lunch service. They'd like to begin sourcing only local apples.

Definition of Local: Must be grown within 200 miles of Imaginary Town/city e.g., Buffalo city.

Original specification reads:

Apples, fresh, 125-138 count, whole and free from decay, injury, or disease.

Revised Specification would read:

Local Apples (must be grown within 200 miles of imaginary city), fresh, 125-138 count, whole and free from decay, injury, or disease.



Geographic Preference Strategy 2

Using a Defined Scoring Advantage

Used when locally produced products are preferred, but not required

- Awards extra points to produce meeting “local” definition.
- Allows vendors with both local and non-local products to bid on the solicitation.
- Sliding scale can be applied based on various criteria met by the vendor (price, local, past experience, etc.).
 - Preference applied to price
 - Preference applied to evaluation points
- CE must not award a contract based solely on local preference.
- Method must be defined legally in a solicitation along with other evaluation factors so that the operator and the vendor understand the rules.

Geographic Preference Strategy 2 Example

Mayberry ISD is purchasing fresh fruits and vegetables through a Request for Proposal

	Chefs' Distributor	Fresh Time Distributor	Acme Food Hub	
				Local preferred, but not required
Price	15	20	15	<p>In this scenario, vendors may receive additional points based on a sliding scale for offering local unprocessed agricultural products grown within the state. Points are awarded as follows:</p> <ul style="list-style-type: none"> · 75% or more = 20 points · >50% to 75% = 10 points · >25% to 50% = 5 points <p>Grown within the state included along other evaluation factors</p>
Product Quality	20	15	20	
Grown within the State	5	10	20	
Food Safety	20	20	20	
Customer Service	15	15	15	
Total Points	75	80	90	



Geographic Preference

Mix of Both Strategies

Used when buying more than one product at once or availability or pricing varies among products

Sunny ISD is planning to procure a mixed order of tangerines, cabbages, and green beans.

They use “local” as a specification for products for which local is a requirement i.e., for tangerines and cabbages which **must be locally grown a 150-mile radius** of Sunny city.

They also use a defined scoring advantage for products for where **local is a preference** but not required, i.e., for green beans a 10-point preference will be given for product within a 200-mile radius.



Knowledge Check

Which geographic preference strategy applies additional points or credit to products that are sourced within a defined geographic range?



Defined scoring advantage

Which geographic preference option can a program operator use when only locally unprocessed products within a specific geographical area are required?



Use “local” as a specification

Are CNP operators obligated to use the geographic preference option?



No, but...

Key Points to Remember

1

Geographic preference allows program operators to create their own definition of local as a specification in the bids and apply it to purchases

2

Geographic preference option is tied to where the unprocessed agricultural product is “grown,” “raised,” or “caught”

3

Terms locally “grown”, “raised”, or “caught” can be used in:

- (i) Bid specification **(Strategy 1)**;
- (ii) Defined scoring advantage **(Strategy 2)**; or
- (iii) A mix of both strategies

4

Some food handling and preservation techniques are allowed. Heating and canning is not allowed

5

TDA and your ESC are here to help in case you have a question on geographical preference!



Module 4: Written Procurement Procedures



Module 4: Policy & Procedures - Written Procurement Procedures



Module 4 Objectives

By completing module 4, you will be able to:

1. Describe what must be included in all procurements and requirements for each type of procurement.
2. Demonstrate how to complete formal and informal purchase templates and include as much detail as possible.
3. Identify questions to ask when preparing for procurement.

Written Procurement Procedures

CEs must have written procedures for the selection, award, and administration of local procurement transactions

General principles

Include but are not limited to:

- Conditions when local preference will be applied as a bonus factor to award contracts.
- Definition for local preference that will be applied to purchasing.
- Process for developing evaluation criteria to award the contract to the most responsive and responsible offer.
- Timeline for planning and implementing the procurement method.

Written Procurement Procedures

CEs must have written procedures for the selection, award, and administration of local procurement transactions

* Please reference the Administrator's Reference Manual (ARM), Section 17a, Procurement Procedures for a complete list of requirements

CEs Must Include:

- Conditions when the CE will use each procurement method.
- Informal—Micro Purchase
- Informal—Small Purchase
- Formal—Request for Proposal (RFP)
- Formal—Sealed Bid (IFB)
- Criteria for using IFB procurement method

Comparing Procurement Methods

	Micro-purchase	Small Purchase	Sealed Bids (IFB)	Proposals (RFP)
When To Use	Aggregate value of the purchase <\$15,000 <i>Certification for higher micro-purchase threshold*</i>	Value of the purchase ≥ \$15,000 and <\$100,000	Value of the purchase ≥\$100,000 A complete, adequate, and realistic specification is available and the contract can be awarded on the basis of price	Value of the purchase ≥\$100,000 Factors other than price will be considered in the contract evaluation criteria
How to Get Bids	Contact vendors directly	Advertise or solicit quotes by phone, email, fax, etc.	Publicly advertise	Publicly advertise
Geographic Preference	Allowed	Allowed	Allowed	Allowed
Other Ways to Target Local Products	Approach only local sources, use specifications and technical requirements Equitably distribute purchase	Approach only local sources; use specifications and technical requirements	Include checklist for responsiveness and include elements such as able to offer farm visits, farm of origin labeling, or taste testing; use specifications	Include other evaluation criteria such as ability to offer farm visits, source identification, or taste testing; use specifications



Written Procurement Procedures

Informal Purchases

CEs must include:

Micro-Purchase:

- Strategies for identifying possible suppliers
- Strategies for equitable distribution for micro-purchases

Small Purchase:

- Strategies for identifying possible suppliers and obtain quotes from at least two potential suppliers.
- Processes for requesting offers, including method for communicating specifications, technical requirements, and terms and conditions.



Written Procurement Procedures

Formal Purchase - IFB and RFP

- CEs must include:
 - Strategies for identifying possible suppliers.
 - Strategies for developing specifications, technical requirements, and terms and conditions, as appropriate.
 - Processes for planning the notification, creating solicitation, and issuing solicitation for the purchase.



Written Procurement Procedures

Important considerations for third-party procurement

- Timeline for reports from the third party for the CE to ensure contracts are operating as intended.
 - TDA recommends that CEs receive reports monthly or quarterly.
- Timeline for the routine reporting of credits, rebates, discounts, and USDA Foods values.
- Process for ensuring that all vendor fees in excess of the stated cost of providing products are returned to the CE, if applicable.
- Processes of communicating local, state, and federal requirements to all contractors and potential contractors.

Specifications

Being as detailed as possible in specifications ensures you receive the quality you want

Specifications are required for all level of bids

Clear specifications ensures:

- You get exactly what you want and receive the quality you expect.
- The product meets your needs and is in good condition.
- Each potential vendor is receiving the same information for fair and open competition.

Specification Example

Which option would you prefer?



Less detailed specification

Apples, red, 40# per case



Detailed specification

- Apples, Fuji, Fresh; 125-138 count
 - Grade-U.S. Fancy
 - Skin fairly smooth and dry
 - Stem intact
 - Stems may be missing provided break is clean and no torn flesh or skin
 - No foreign matter
 - Fine grained, tender juicy flesh
 - Evenly sized, harvested ripe

Informal Purchase Templates

Micro-Purchase Log

Texas Department of
Agriculture

Form | Procurement | Micro-Purchase
March 2026

Micro-Purchase Log

Use this form for purchases with a total cost equal to or less than the federal \$15,000 threshold, an internal micro-purchase threshold more restrictive than the federal limit (Enter internal threshold: _____); or a TDA-approved self-certification amount when the micro-purchase option is the method of procurement (Enter approved threshold: _____).

Organization Name:

Organization ID:

Program Year:

Date of Purchase	Vendor/ Supplier Name, Address	Product(s) and/or Service(s) Purchased <i>(Quantity + Description)</i>	Unit Price for Each Item	Total Cost	Reason for Using Micro-Purchase, the Method Used to Determine That the Cost of Each Item Is Reasonable, and Any Other Relevant Information/Justification <i>(Attach Relevant Documentation)</i>

Informal Purchase Templates

Helps CEs

- Provide the same technical specifications and bid information to all potential bidders.
- Maintain the documentation required to demonstrate compliance with the small purchase regulations.

Small Purchase Log

Texas Department of Agriculture		Form Procurement Small Purchase March 1, 2024			
Small Purchase Log					
<i>(Use this form for purchases with a total cost of less than the simplified purchase threshold that are not micro-purchases.)</i>					
CE Name: _____		CE ID: _____		Program Year: _____	
Technical Specifications	Product(s)/Service(s) to Be Procured:				
	Description:				
	Quantity:			Delivery Frequency/Location(s):	
Vendor/Supplier Information	Vendor/Supplier Name & Contact Information:		Vendor/Supplier Name & Contact Information:		Vendor/Supplier Name & Contact Information:
	Contact Date:	Contact Method:	Contact Date:	Contact Method:	Contact Date: Contact Method:
	Unit Price:	Extended Price:	Unit Price:	Extended Price:	Unit Price: Extended Price:
Notes:		Notes:		Notes:	

Formal Purchase Documentation

Solicitation Document

Solicitation takes the form of a documentation for IFBs and RFPs

The solicitation document describes:

- Specifications and/or technical requirements for the products
- Method and criteria for evaluation of responses
- Method and schedule for submitting an offer
- Form of contract with terms and conditions



To maintain accurate records, CE's written procurement procedures should clearly describe how the CE will develop and retain the solicitation document.

*NB: CEs should refer to the current Administrator's Reference Manual (ARM) Section 17 on Procurement for detailed guidance.

Other Procurement Steps

Evaluation of Offers and Award of Contract

- Details in written specifications and vendor responses must match.
- CE must award the contract to the offeror that is most responsible and responsive to the solicitation based on most cost-effective use of federal funds.
- CEs must retain documentation demonstrating why the offeror was awarded the contract.

Contract Management

- Use of funds is compliant with all Federal, State and local regulations.
- All specifications, technical requirements and terms and conditions of all contracts are executed correctly.
- Products meet the specifications as described in the solicitation.

Key Points to Remember

1

CEs must have written procedures for selection, award & administration of local procurement transactions

2

Definitions for local & conditions when local preference will be applied as a bonus factor must be included

3

Informal, formal and third-party procurements have unique sets of written procedures or specifications

4

CEs must retain documentation demonstrating why the offeror was awarded the contract

5

Ensure that vendors are compliant with all federal, state and local regulations

Before proceeding, always refer to procurement guidelines and contact your ESC or TDA in case you have questions!



Module 5: Resources & Next Steps



Module 5: Resources & Next Steps



Module 5 Objectives

By completing module 5, you will be able to:

1. Describe the local procurement checklist for CNP operators.
2. Identify TDA and USDA resources for local procurement.
3. Develop a simple plan of action to follow-up upon return to work.

Local Procurement Process Checklist



Checklist designed to support operators in planning, implementing and managing local procurement activities.

- The checklist follows the full procurement lifecycle.
- Helps operators see how individual decisions connect across time.
- Allows operators to reference the checklist at different stages of procurement, rather than using it only once.

Local Procurement Process Checklist

A guided checklist for Texas Child Nutrition Programs to procure local foods

- This checklist is a quick reference aimed at helping program operators find, buy, and incorporate local foods into any child nutrition program.
- It is important to note that the checklist does not cover the entire scope of procurement. Please consult the **Administrator's Reference Manual (ARM) and Handbooks**, along with relevant manuals, alerts, notices, and guidance on operating the program.

1. PLANNING

Needs Assessment

• *Menu planning*

- Identify local foods that are already in your program menu and where you can incorporate more local products and new recipes.

• *Finding local food in your region*

- Review Harvest of the Month (HOM) calendar to identify available products and to align with peak availability.
- Use the Farm Fresh Network map to find producers and product availability in your area.
- Work with local extension offices and Education Service Centers to learn more about the community and available vendors.

Note: Intended for use as a job aid, not as a replacement for procurement policy and procedures, or official guidance.



Local Procurement Process Checklist

Reminder

- The checklist is designed to support:
 - Preparation before procurement begins
 - Consistency during procurement activities
 - Documentation and compliance throughout the process
 - Reflection and improvement after procurement is completed



 [Checklist Link](#)



TDA Opportunities

Farm Fresh Challenge

<https://squaremeals.org/FandN-Resources/Texas-Farm-Fresh/Farm-Fresh-Challenge>

FRESH TRAYS Networking Sessions

<https://freshtrays.tamu.edu/category/events-networking-sessions/>

Farm Fresh Culinary Workshops

<https://squaremeals.org/Programs/National-School-Lunch-Program/Farm-Fresh-Culinary>



USDA and ICN Resources

Procuring Local Foods for Child Nutrition Programs

<https://www.fns.usda.gov/f2s/procuring-local-foods>

Farm to School website

<https://www.fns.usda.gov/f2s/farm-to-school>

Procuring Local Foods for Child Nutrition Programs

First Choice, a handbook for developing an effective procurement process

<https://theicn.org/icn-resources-a-z/procuring-local-foods-for-child-nutrition-programs/>



Summary

Local products can help
increase program
participation

They can span the whole
tray, not just fruits and
vegetables

The definition of local can
vary and is defined by the
CE

There are many options
to find and buy local

Every procurement method
can be used to buy local
products

TDA and your ESC are
here to help!



Next Steps



**5-minute Countdown
Timer**

1. Identify Key Takeaways

Identify elements of
the training that are
relevant to YOU

2. Create a Plan

Identify actions that
you can take upon
return to work

3. Follow-Up and Accountability

How will you hold
yourself
accountable?

Write down your
ESC/TDA contact
info



Training Survey

- Anonymous short survey (5 qstns)
- Help understand how the training has influenced your knowledge and confidence in procuring local food
- Used to improve future trainings and make it as effective as possible
- Not used to grade the instructor or the CEs!



<https://www.jotform.com/form/253364347072154>





Questions?



- <https://app.smartsheet.com/b/form/99abb40ec52f41779b059baf4b124ea7>



Contact Us



- www.SquareMeals.org
- squaremeals.org/FandN-Resources/Texas-Farm-Fresh



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2. fax:

(833) 256-1665 or (202) 690-7442; or

3. email:

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