



Procurement in School Nutrition Programs

Professional Standards:

2420 - Bid Solicitation and Evaluation

2430 - Purchase Food, Supplies, and Equipment

2460 - Contracts with Food Service Management Companies
(FSMC)

Agenda

- Welcome
- Objectives
- School nutrition programs procurement
- Suite of solicitation templates and tools
- Vendor Request for Proposal (RFP) template walk-through
- Q&A
- Contact information
- Using the chat feature

Welcome

Presenter introductions:

- Office of the State Superintendent of Education (OSSE) and Harrison Institute for Public Law teams



Objectives

Food service directors will:

- Feel empowered and knowledgeable to procure for their school nutrition programs
- Know what resources are available and how to use them
- Know who to contact and how to request technical assistance

Procurement in School Nutrition Programs



Empowerment

- School Food Authorities (SFAs) manage the procurement process and feel empowered to tailor solicitation documents to support accomplishing the mission of their school food program.
- OSSE school nutrition programs new [suite of solicitation templates and tools](#) (optional)
 - Meets all federal and local requirements
 - Increased customization
- SFAs may create their own solicitation documents, use OSSE templates, or a combination*



School Nutrition Programs Procurement - A Step Back

What are the procurement requirements for school nutrition programs?

Purchases made (in entirety or partially) utilizing federal reimbursements must be secured following federal procurement guidelines*

- This applies to contracts for food, supplies, materials, equipment, services and any other items funded by nutrition program reimbursements
- SFAs must maintain documentation for procurements that utilize federal reimbursements

What are the formal procurement methods?

Type and Description	Best to use when:
Invitation for Bid (IFB): the document used in soliciting bids through the formal advertising method of procurement. IFBs are awarded to the responsive and responsible bidder with the lowest price.	Quality does not vary significantly. <i>Example: kitchen equipment.</i>
Request for Proposal (RFP): the document used in soliciting bids through the formal advertising method of procurement. RFPs are awarded to the responsive and responsible bidder whose offer is most advantageous to the SFA based upon evaluation criteria specified.	Quality may vary significantly. <i>Example: meals.</i>

Why is it important to be compliant in procuring?

- Provides free and open competition
 - All suppliers are on the same playing field and have the same opportunity to compete
 - Not following procurement requirements and regulations can lead to invalid contracts, delayed and incomplete services, and even legal action
- Increased competition can lead to **better prices** and **better quality of products and services**

What are the process requirements for each procurement method?

Procurement Method	Requirement
Food Service Management Company (FSMC) RFP	<ul style="list-style-type: none"> • Bids are publicly solicited • Two or more responsible bidders are willing and able to compete • Submit solicitation documents to OSSE for review
RFP	<ul style="list-style-type: none"> • Bids are publicly solicited • Two or more responsible bidders are willing and able to compete
IFB	<ul style="list-style-type: none"> • Bids are publicly solicited • Two or more responsible bidders are willing and able to compete • Bid opening required: Proposal must be opened publicly and recorded (DCPS and PCS only)
Informal (small purchase)	<ul style="list-style-type: none"> • At least two qualified quotes are collected

Updated Processes

Solicitation document review – FSMC solicitations only

- SFAs soliciting for an FSMC must submit to OSSE school nutrition program specialist:
 - Solicitation documents for review and approval prior to public release
 - Scoring and evaluation tools for review and approval prior to award
- SFAs may request technical assistance for non FSMC solicitation documents

Bid openings – IFBs only

- DC Public Schools (DCPS) and public charter schools require a public bid opening; private schools do not
 - SFAs is responsible for hosting the public bid opening
 - OSSE may be present as an observer, by request of the SFA



School Nutrition Programs
Suite of Solicitation Templates
and Tools

Templates and Tools

Solicitation Templates

[FSMC RFP](#)

[Vended Meals RFP](#)

[Vended Meals IFB](#)

[Food Items RFP](#)

[Food Items IFB](#)

[Non-food Items RFP](#)

[Non-food items IFB](#)

Additional Tools

[Solicitation Templates Instructions for Use – “How To”](#)

[Responsive Bidder Checklist](#)

[Evaluation Scoring Sheet](#)

[Bidder References](#)

Pricing Sheets – [Food](#) and [Non-Food](#)

[Procurement Timeline and Checklist](#)

How to use a solicitation template

1. Open the [NSLP resources procurement templates folder](#)
1. Download a copy of the desired template

Let's take a dive into the templates!





Vendor RFP Template Walk-through

Hands on: Practice customizing a solicitation template

- Complete all text in **blue**
 - Example: Section C.1, Scope: Values statement

[Insert goals such as “Our SFA is a learning community that ensures high academic achievement for all students in both Spanish and English, develops leadership, and values all cultures. Our vision is to expertly combine rigorous academics with rich school culture as we prepare the next generation for success on a global scale. Specifically, in our child nutrition programs, we aim to provide local, sustainably-produced food in order to remove health barriers to learning so students are prepared to succeed in school and in life.”

Hands on: Practice customizing a solicitation template

- Do not change text highlighted in **RED**
 - Example: Section B.3, Food specifications

2. Dairy

- All milk must be fat-free (skim) or low-fat (1% fat or less) and unflavored

Hands on: Practice customizing a solicitation template

- Decide to keep as is or change text highlighted in **YELLOW**
 - Example: Section L.2 Technical rating scale

Bids will be evaluated using the following criteria:

- **Pricing – 40 points**
 - Total Bid Cost (*Base Year*)
- **Method of Approach and Implementation – 25 points**
 - Menus and Nutrient Analysis meet federal and local requirements (*Show variety in nutritional food choice including vegetarian options*) –**5 points**
 - Menus meet additional specifications in the RFP **5 points**
 - Utilization of USDA Foods –**5 points**
 - Food & Packaging (*Appearance, Quality, Taste and Acceptance*) –**5 points**
 - Geographic Preference – use locally grown or raised foods to maximum extent possible - **5 points**

Hands on: Practice customizing a solicitation template

- Decide to keep as is or use alternate language provided for text highlighted in **GREEN**
 - Example: Section H.1, Method of award

2. The SFA will award a single contract resulting from this solicitation to the responsive and responsible bidder who has the lowest bid, taking all factors into consideration.

H.1 option: The SFA may award a single contract resulting from this solicitation to the responsive and responsible bidder who has the lowest bid, or multiple contracts to responsive and responsible bidders on the basis of school and/or campus, if it is deemed to be in the best interest of the SFA.

Hands on: Practice customizing a solicitation template

- Text that is not highlighted may be left as is, or changed to meet the specific needs of the SFA
 - Example: Section B.7, Format of Bids

B.7 FORMAT OF BIDS

The Format of the submitted proposal should have four (4) sections:

Section One will be titled Executive Summary. The Procurement Officer can review this section to determine if the vendor meets the Qualifications of the Bidder. Bidders can use the Bidder Checklist



Timeline and USDA Foods



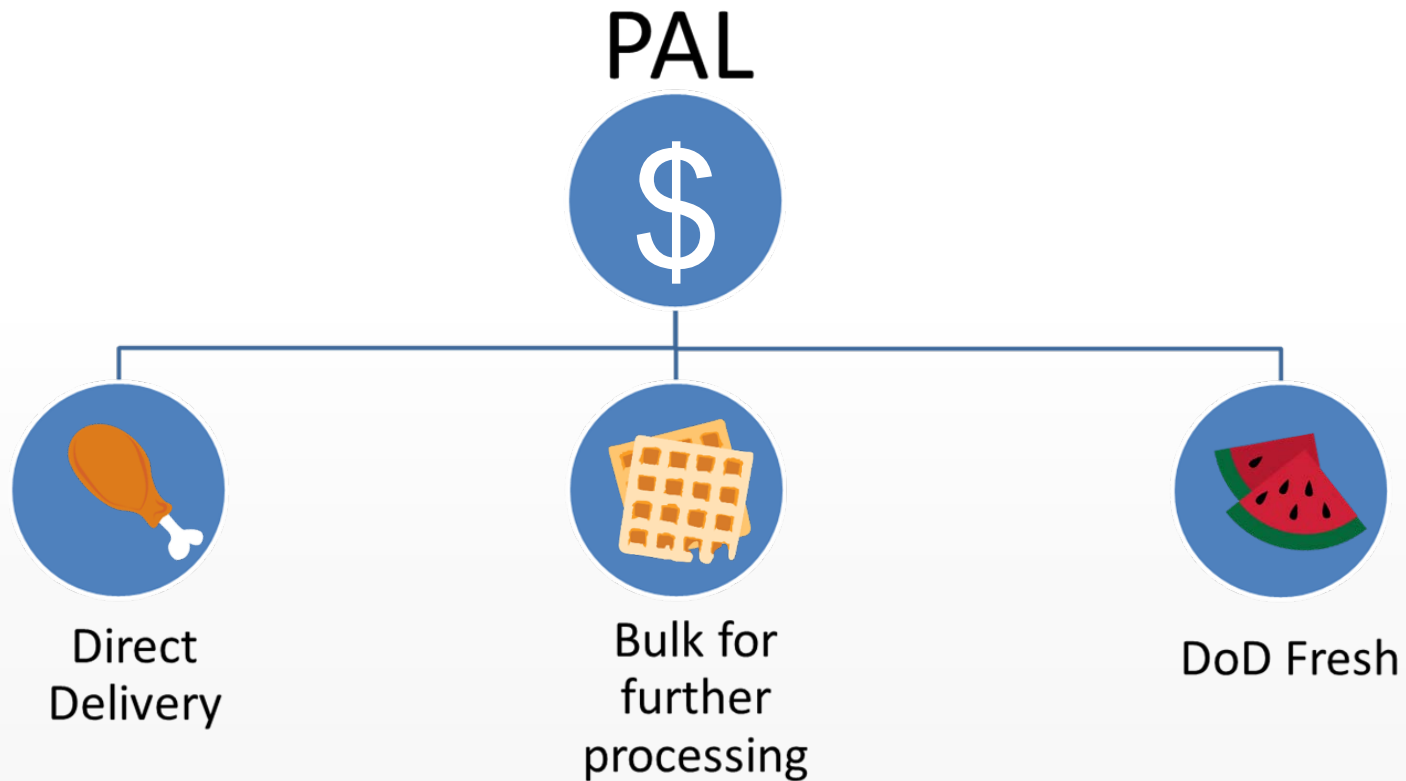
Procurement Timeline and Checklist

Month	School Food Authority
November	<ul style="list-style-type: none"> Determine food service contract needs for the upcoming school year: extend current contracts (if applicable) or go out for bid
December	<ul style="list-style-type: none"> Develop documents as applicable – Invitation for Bid (IFB), Request for Proposal (RFP), informal, extension, and/or modification Submit proposed documents to OSSE for review, if desired Attend OSSE training, if desired
January	<ul style="list-style-type: none"> Food Service Management Company (FSMC) solicitations only: Submit solicitation documents to OSSE for review and approval IFBs and RFPs only: Publicly post the notice of availability of solicitation documents according to federal procurement regulations
February-April	<ul style="list-style-type: none"> IFBs only: Host bid opening; review proposals; make an award RFPs only: Evaluation panel reviews proposals; make an award FSMC only: Submit selected proposal and evaluation tools to OSSE for approval prior to award
May-June	<ul style="list-style-type: none"> Maintain all documentation associated with the procurement according to federal record keeping regulations



USDA Foods & Procurement

Procurement Implications: Developing solicitations and awarding bids according to the Procurement Checklist and Timeline will help OSSE, SFAs, and bid awardees make timely decisions about USDA Foods.



Empowerment





Q&A

School Nutrition Program Procurement Resources

- [Procurement training documents](#)
- [Procurement templates](#)
- [Federal regulations](#)
 - Updated as of Oct. 16, 2019
 - New regulations or guidelines are communicated via the [Beyond the Tray newsletter](#)

Liz Leach, School Programs Team Manager

Email: Elizabeth.Leach@dc.gov

Phone: (202) 531-2680

Erica Walther, NSLP Compliance Manager

Email: Erica.Walther@dc.gov

Phone: (202) 262-0893

Alex Dobbs, Program Specialist, NSLP

Email: Alex.Dobbs@dc.gov

Phone: (202) 322-1713

Kimberly Thompson, Program Specialist, NSLP

Email: Kimberlya.Thompson@dc.gov

Phone: (202) 417-1948

Beth Hanna, Program Specialist, USDA Foods &
Farm to School

Email: Elizabeth.Hanna@dc.gov

Phone: (202) 957-7438

Nigel Henley, Training & Communications
Specialist

Email: Nigel.Henley@dc.gov

Phone: (202) 765-7198

Stay in Touch!

