




WHAT'S NEW IN SCHOOL NUTRITION- PROCUREMENT PLAN

MONTHLY WEBINAR, OCTOBER 24, 2016

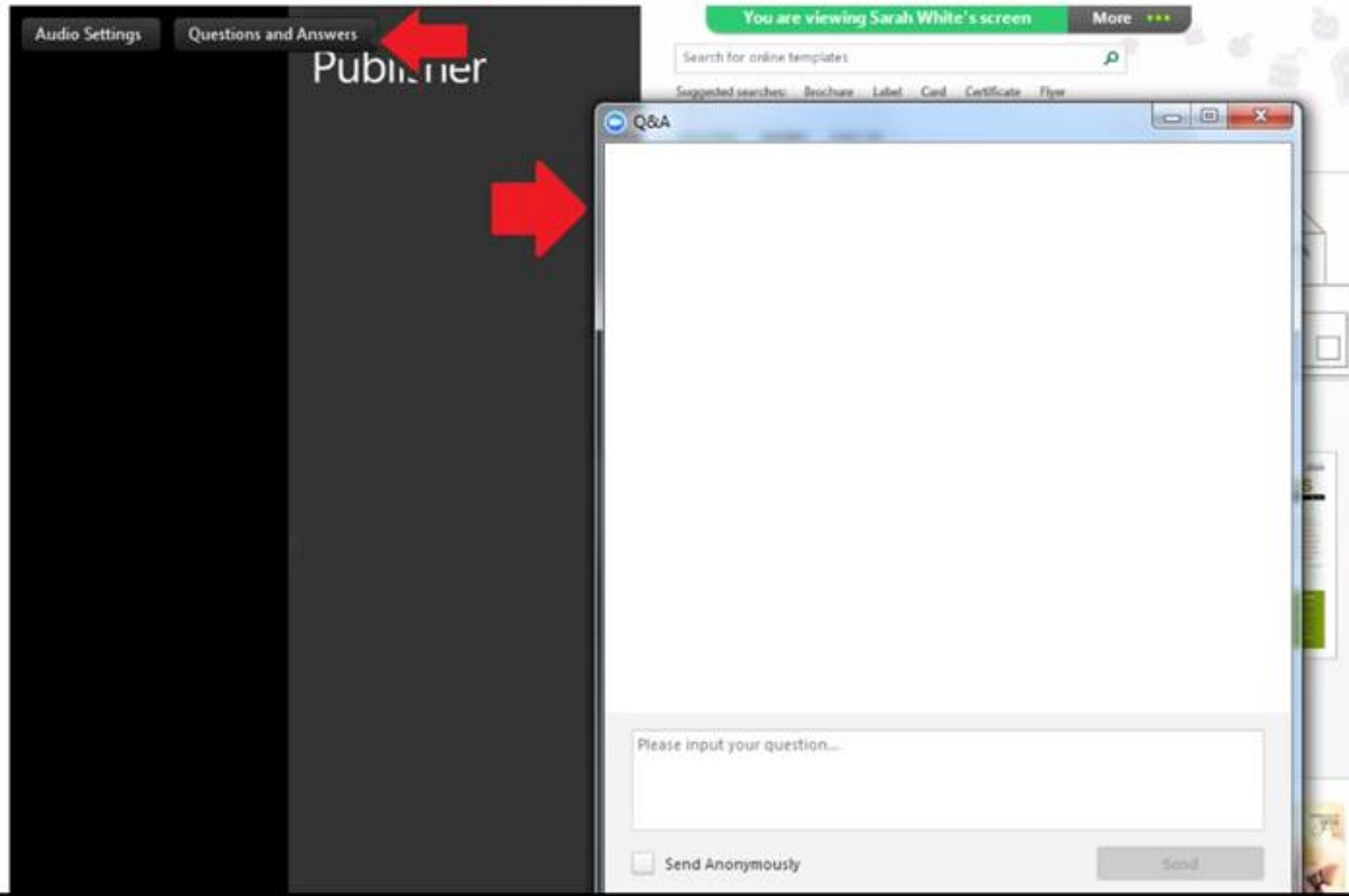
WELCOME!!

- To a resource for new and not so new school nutrition managers.
- To a monthly live link to the Bureau of Nutrition and Health Services.
- To a forum for you to ask questions and get answers.

HOUSEKEEPING

- Handouts emailed and will be posted.
- All participants are muted. A square icon with a dark background, a white microphone symbol, and a red diagonal slash over it, indicating that audio is muted.
- To ask a question, click on Questions & Answers

If at any point during the webinar you have a question please click on the Questions and Answers button to bring up the Q&A box. Type your question and click "Send".



THIS WEBINAR AND TRAINING DOCUMENTATION FOR USDA PROFESSIONAL STANDARDS

Document the time you spend watching this webinar or other webinars presented by our Bureau.

Participation Documentation in handouts

Learning Objectives for today are under
Operations/Purchasing (2400)

2430- Purchase food, supplies, and equipment through vendors, meeting school district specifications in compliance with Federal, State, and local procurement regulations and availability of USDA Foods.

PROFESSIONAL STANDARDS DOCUMENTATION

- Name of individual(s) attending
- Name and date of event
- Length of Training (hours earned)
- Key Areas, Topics, and Learning Objectives
 - Nutrition
 - Organization
 - Administration
 - Communication and Marketing
- Cumulative Total for Year

MONTHLY MEMO REVIEW

- Sent to designated Authorized Representative and Food Service Director in IowaCNP
- Contact patti.harding@iowa.gov to receive these
- History for last 5 years on <https://www.educateiowa.gov>



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Nutrition Programs

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Contact(s)

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The Bureau of Nutrition and Health Services administers several programs that provide healthy food to children. Each of these programs helps fight hunger and obesity by reimbursing organizations such as schools, child care centers, and after-school programs for providing healthy meals to children.

The Iowa Department of Education's mission for Nutrition Programs is to facilitate and promote quality USDA Child Nutrition Programs that will benefit the education, health, and well-being of the citizens of Iowa. Please find links to each program below:

- [Child and Adult Care Food Program](#)
- [Fresh Fruit and Vegetable Program](#)
- [National School Lunch Program](#)
- [School Breakfast Program](#)
- [School Wellness](#)
- [Special Milk Program](#)
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School Meals

Below are common resources and tools utilized in the National School Lunch and School Breakfast Programs.

[Civil Rights](#) - Manual and presentation to provide training to staff. It includes handouts, worksheets, attendance records and resources.

[Diet Modification Request Form](#) - All requests for dietary changes will need a completed Diet Modification Request Form. School Nutrition Programs must make dietary substitutions and modifications when related to a disability when signed by a licensed prescribing medical professional. While schools must meet dietary needs related to a disability, other non-disability requests may be made at the discretion of the local school food service program.

- [Diet Modification Request Form](#)
- [Diet Modification Request Form - Spanish Translation](#)
- [Diet Modification Form Question and Answer](#)

[Fluid Milk Substitutions](#) - Certain soy milk companies and varieties contain needed nutrients to meet the definition of nutritionally adequate. Regulations no longer allow school authorities to substitute orange juice for fluid milk in all circumstances.

Forms - USDA requires accurate daily meal counts. The Edit Record and the Self-Monitoring Form for On-site reviews are tools to ensure accurate reporting.

- [Edit Record for Meal Counts Individual Bldg](#)
- [Self Monitoring Form for Onsite Reviews](#)

Contact(s)

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Monthly Memos and Updates - Schools

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Each month new memos, reminders of tasks or reports that are due, and new information are delivered to the Authorized Representative and Food Service Director identified for the School Food Authority (SFA). Previously it was included with the warrants when they were mailed and now it is emailed since payments are directly deposited.

Be sure to read the Bureau Notes each month for timely messages about the attachments.

The messages emailed will also be posted here so mark your calendar to check here regularly in case your email message becomes blocked.

2017

- 2016/09/19 - [Verification Training September 20 & 27, USDA Memos on FSMC, Food Corp. and SFSP, FSMC Webinar and What's New Webinar](#)
- 2016/08/24 - [Free and Reduced Price Eligibility determination and access for low-income, transfer and limited English skills students](#)
- 2016/07/06 - [Iowa Application Webinar July 14 & 27, Public Media Release Requirement for FY17, and IowaCNP 17 Open and 16-17 Public Release](#)

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2016

- 2016/06/23 - [FY17 School Meal Programs Information, FY17 Application Packet, What's New Webinar](#)



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[Read more](#)

Questions about Monthly Memos???

STEP BY STEP THROUGH THE PROCUREMENT PLAN

Objectives:

Participants will:

- identify SFA/non-SFA individuals responsible for school food service procurement
- identify school food service procurement events for SY 2017
- understand documentation to use to estimate the value of a procurement event
- identify the correct procurement method for each procurement event.

STEP BY STEP THROUGH THE PROCUREMENT PLAN

Objectives (cont.):

- identify the contract award type and contract duration for each procurement event
- identify the evaluation method used for vendor responses especially as related to price, and
- identify SFA individual(s) responsible for contract management.

STEP 1 – DETERMINE THE PLAYERS

How does the School Food Authority (SFA) procure for the Child Nutrition Programs it operates. The SFA can procure:

- Independently – the SFA develops, evaluates, selects, awards contracts, and manages vendor(s) contracts.
- Uses the services of an agent
- Uses a third-party entity such as the Group Purchasing Organization (GPO).

STEP 1- DETERMINE THE PLAYERS

To complete the procurement plan:

- Identify the name and job title of all individual(s) at the School Food Authority (SFA) or non-SFA agents/entities who are responsible for Child Nutrition Program (CNP) procurement/purchases.
- These individual(s) will sign and date the CNP procurement plan.

STEP 2 - LOCAL POLICIES

- Obtain the Local board Purchasing –Bidding policy
 - Public SFAs – most Purchasing-Bidding policies are found in the 700 series
 - Non-public schools – check with your Diocese/Administration
 - Residential Childcare Institutions (RCCL) food service staff – check with your Business Official
- Obtain the local board Code of Conduct policy
 - Public SFAs – board approved policy on gifts to employees –Series 400 and Administrative Code of Conduct – Series 300
 - Non-public schools – check with your Diocese/Administration
 - Residential Childcare Institutions (RCCL) food service staff – check with your Business Official

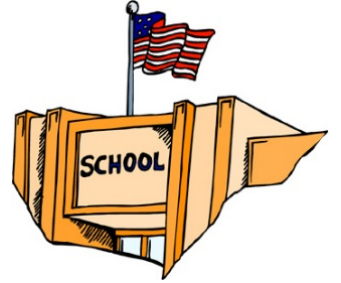
CODE OF CONDUCT POLICY

Review the SFA policy to ensure the following three points are addressed:

- Conflicts of interest, real or apparent for employees engaged in the selection, award, and management of contracts.
- Prohibit officers, employees, and agents from soliciting or accepting gifts, gratuities, favors or anything of monetary value from contractors or parties of subcontracts.
- Provide for disciplinary actions for violations of the conduct by officers, employees, or agents.



STEP 3 - DETERMINE LOCAL PURCHASE THRESHOLD



Federal Procurement Requirements

<\$3500 no competitive bids required

\$3500 - \$150,000 – quotes will be obtained

≥150,000 – competitive bids or competitive proposals required

EXAMPLE: SFA policy

≤\$3000 no competitive bids

>\$3000 but ≤\$25,000 – shall receive quotes, proposals, or bids

>25,000 Competitive Bids or Request for Proposals are required.

SCHOOL FOOD SERVICE PURCHASE THRESHOLD MORE RESTRICTIVE THAN USDA

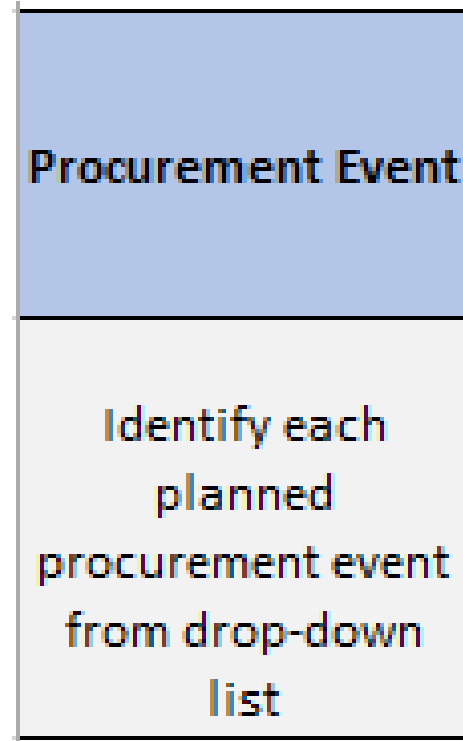
School Food Service Purchase Threshold

- **Micro- Purchase method** - Purchases under and equal to \$3,000 can be made without competitive quotations, proposals, or bids.
- **Small Purchase (3 Bids and a Buy), Competitive Sealed Bid (IFB), or Request for Proposal (RFP) Method**- Purchases above \$3,000 but no more than \$25,000, can be made by obtaining price quotations, competitive sealed bid, or competitive proposal.
- **Competitive Sealed Bid (IFB) or Request for Proposal Method (RFP) Method** - Purchases above \$25,000, must use competitive proposal or sealed bids.

PROCUREMENT EVENT

A Procurement Event is the process of deciding how to purchase a single item or multiple items from a vendor or vendors. The actual purchases could be at a single point in time or over a period of time (typically a year).

Column A3, A4



PROCUREMENT EVENT EXAMPLES

- Purchase of multiple items weekly for the entire school year from a single vendor
- Purchase of milk and dairy weekly for the entire school year from a single vendor
- Purchase whole turkeys for a Thanksgiving meal once from a single vendor
- A non-public school purchases student and adult lunches daily from a public school district. A signed agreement exists between the public and non-public school.

IDENTIFY PLANNED PROCUREMENT EVENT

What did your SFA purchase with money from the school nutrition funds in the past year?

- Obtain a velocity/usage report if the SFA purchase most foods and supplies from a main vendor, also know as prime vendor
- Obtain a vendor paid list or year-end report from the business office and enter the information in the chart provided in the next slide
- Review previous school year's receipts from each vendor and enter the information in the chart provided in the next slide

SFA PROCUREMENT TABLE

Micro Purchases (Purchases from vendors valued at \$3,500 or LEA's threshold for non-competitive purchases, whichever is lower)				
Name of Vendor	Goods/Services Provided	Total Paid to Vendor	How many purchases were made from this vendor during the school year?	
Small Purchase/Informal Contracts (Purchases from vendors valued at \$150,000 or LEA's small purchase threshold, whichever is lower)				
Name of Vendor	Goods/Services Provided	Total Paid to Vendor	Was this a one-time purchase or did the SFA use this vendor for multiple purchases?	Did the SFA use this vendor for multiple purchases?

PRODUCTS AND/OR SERVICES

Column B3, B4

- Prime Vendor – dry, canned, refrigerated, and frozen foods, supplies, and distribution services
- Milk and Dairy – Chocolate fat-free, plain fat-free, plain 1%, and cottage cheese 2%%
- Breaded Products – WG-rich hamburger buns, WG-rich hot dog buns, WG-rich sandwich bread



VALUE OF THE PROCUREMENT EVENT

Column C3, C4

- Forecast quantity of foods and supplies that will be needed for a specific time period. See #12 in the handout provided with this webinar.
- The SFA Procurement Table.
- Determine Average Daily Participation by site/school – use IA_CNP monthly claims data.

Value of the Procurement Event
Total estimated for each event

PROCUREMENT METHOD USED

Column D3, D4

- Look at the value of each procurement event.
- Compare to the local purchase thresholds determined for school food service purchases.
- Select a procurement method for each procurement event.



pts the bid of BIDDER, and BIDDER enters into a cc
cordance with the invitation to bid. and further.

Procurement Method Used
Identify method for each event from drop-down list

CONTRACT AWARD TYPE

Column E3, E4

Procurement Events use the following methods:

- Micro-purchase – there is no contract type. The SFA must purchase the items as priced by vendor.
- Small Purchase Method – contract type is fixed price with or without an economic price adjustment
- Sealed Bids – Must result in a fixed price contract
- Request for Proposal – either a fixed price or cost reimbursable (cost plus fixed fee) contract

Contract Award Type
Select Fixed Price or Cost Reimbursable for each event

CONTRACT DURATION/FREQUENCY

Column F3, F4

- Micro-purchase method – the contract duration and frequency will be left blank.
- Small Purchase, Invitation for Bid (IFB), and Request for Proposal (RFP) – a contract is required.
 - Initial contract – one year duration
 - Any renewal(s) – up to four additional years provided scope of work remains unchanged.

Contract Duration/ Frequency
Contract Agreement period for each event

GROUP PURCHASING ORGANIZATION

Column G3, G4

Name of the Group Purchasing Organization (GPO) or Cooperative, if applicable for any planned procurement event(s).

Group Purchasing
Insert name of Group Purchasing Organization (GPO), if applicable

PRIME VENDOR

Column H3, H4

Insert name of Prime Vendor for any procurement event, if applicable.

Prime Vendor
Insert name of the Prime Vendor, if applicable

EVALUATION OR DETERMINATION METHOD USED

Column 13, 14

Two types of evaluation methods

- Line Item Solicitation – the SFA awards the contract to the vendor with the lowest price on a single item.
- Bottom Line Solicitation – similar items are grouped together.
 - Product grouping (market basket)
 - All or nothing (prime vendor)

Evaluation or Determination Method Used
Select-Bottom Line or Line Item from drop-down list for each event

CONTRACT MANAGEMENT

Contract management falls into two broad categories:

- Inventory Management
- Cost Management

Column J/K3, J/K4

Contract Management	
Who Receives and Confirms Products as Ordered; Notes Exceptions	Who Confirms Products and Prices, Adjusts for Exceptions, Enters into Payment System

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To file a program complaint of discrimination, complete the [USDA Program Discrimination Complaint Form](http://www.ascr.usda.gov/complaint_filing_cust.html), (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

- (1) mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
- (2) fax: (202) 690-7442; or
- (3) email: program.intake@usda.gov.

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Questions???

WHAT'S NEW IN SCHOOL NUTRITION NOVEMBER 21

Monthly memo update as needed

Marketing Your Meals to Increase Participation

Registration link on calendar OR Link on Education Events-Nutrition



**CONGRATULATIONS!! YOU'RE ON YOUR WAY TO UNDERSTANDING
CHILD NUTRITION PROGRAM PROCUREMENT.**