

Local Food Solicitation Guide

School Nutrition Unit



Please reach out to the CDE School Nutrition Procurement or Farm to School contact for an editable version of this document or a blank "Solicitation Outline."

How to use this document:

This outline is intended for use in a solicitation for local foods for school nutrition programs. These instructions should be used as an accompaniment to the "Local Food Solicitation Blank Outline." It is best practice to include all sections in this document for formal procurement solicitations. Please note this is not an exhaustive list of all formal contract requirements. Please refer to the [Formal Purchase Checklist](#) to see requirements. This outline can also be used for informal solicitations, particularly the small-purchase method.

The appropriate procurement method depends on the total dollar amount the sponsor intends to spend. All procurement must be conducted in a manner that maximizes free and open competition. Contracts should be awarded to the bidder that is most responsive and responsible.

Additions or edits should be made to applicable sections or language to meet the needs of each sponsor. The user of this document is responsible for utilizing proper solicitation language.

In preparation for soliciting local foods, we recommend reviewing these resources:

- [Source Food, Supplies, & Services](#) training video
- [Common Procurement Terms](#)
- Nourish CO's [Guidebook](#) including [Know Your Procurement Method](#)
- [USDA Procuring Local Foods webpage](#)

Procurement Methods:

Micro purchases (>\$10,000 spent annually with a vendor, or local micro purchase threshold) This outline is not essential for a micro purchase but can be used to solicit bids for items that would fall under the micro purchase threshold. Micro purchase prices must be reasonable based on research, experience, purchase history, or other information, and documentation should be kept on file. Micro-purchases should spread the wealth among qualified vendors.

Small purchases (\$10,000-\$250,000, or local small purchase threshold)

Portions of this outline can be used when gathering price quotations or rate quotations. Collection of price or quotes can be verbal or written but must be documented. This outline is not required for a small purchase threshold, but certain sections serve as documentation of price quotations from an adequate number of sources when making purchases. [An alternative is to use the Informal Purchasing Log found here.](#)

Formal purchases (\$250,000 +, or local formal purchase threshold)

This outline provides language or requirements specific to local food procurement. There are two types of formal solicitations:

- **Request for Proposal:** Score is based on multiple factors and has a scoring matrix, awarded to the responsible and responsive vendor whose proposal scored the highest number of points, and is most advantageous to the program with price and other factors considered.
- **Invitation for Bid:** Publicly solicited and awarded to the responsible bidder that is the lowest bidder. Only prices are considered when choosing the vendor.

Reminders:

- All procurement regulations apply to the solicitation of local food.
- See the [School Nutrition Unit Procurement Web Page](#) to determine your appropriate procurement method and find additional resources.
- Local Food Program funds can be utilized to purchase Colorado grown, raised and processed products.
- Formal procurement solicitations can include specifications for local. The sponsor should determine the definition of local, but may not be overly restrictive. An example of overly restrictive is “produced within 2 miles of school district warehouse.”
- [USDA Procuring Local Foods Guide](#)
- All retention of records apply. (2CFR 200.334)

SOLICITATION OUTLINE

Bid # _____

Pre bid conference date: _____

Bid response due date: _____

PURPOSE: Describe why you are posting the solicitation. For example, why is your sponsor wanting to source local foods.

BACKGROUND: Share applicable details about your district such as size, demographics, sites, nutrition program, or farm to school goals.

TABLE OF CONTENTS: Consider including a table of contents if your final document is lengthy. It may help a vendor reference a particular section of your solicitation. You may consider including section titles and appendices.

Part 1: INSTRUCTIONS TO VENDOR

1. Invitation for Bid or Request for Proposal
 - a. Describe how the bid will be received in accordance with terms and conditions established within the bid. Note that the vendor assumes responsibility for having the bid in on time.
 - b. List delivery locations (may include as an appendix if needed)
 - c. Product specifications (delete those not applicable)
 - i. Specify the solicitation is for local products and your sponsor's definition of local. For example, "grown within 100 miles of school district office."
 - ii. Product type: could include only local varieties, certified organic
 - iii. Product grade: grade A, grade B, etc.
 - iv. Product size: small apple, large apple, 110 count
 - v. Freshness: expectation on harvest to delivery that product will be delivered, such as "within 7 days of harvest."
 - vi. Required grower label
 - vii. Size of farm
 - viii. Ability for the sponsor to do an on-site farm visit
 - d. It is optional to include a form that lists required documents that make a complete bid. This ensures you receive all necessary documents to choose the best vendor option. For example, the "list of required documents" may specify the vendor must include: a bid document, pricing document, food safety plan, insurance certificate, water test, etc. If a bidder does not include all required documents, you could consider them "non-responsive" and not award that bidder a contract.
 - e. Provide additional bid information:

This institution is an equal opportunity provider.

- i. Include: *Bids may be withdrawn with written notice from the agent who signed the original document. Bid will be received, (by time and date) for the furnishing and delivery of fresh fruits and vegetables to the delivery sites specified in the Delivery Locations document (if required as an appendix) that accompanies this bid. This will be in accordance with terms and conditions established in this bid. All bids received after the time specified will not be opened or considered. The vendor is responsible for having their bid delivered on time to the location specified.*
 - f. Notification to vendor: Include when and how the vendor will be notified.
- 2. Preparation of bid documents
 - a. Describe how the documents must be provided to the sponsor. For example, you may specify the vendor must complete certain documents included within the solicitation documents.
 - b. Where should bid documents should be emailed, mailed, submitted, or dropped off.
 - c. Pricing structure: raw food cost, deliver cost, pack sizes
 - d. Signature requirement
- 3. Withdrawal of vendor
 - a. Include: *Bids may be withdrawn with written notice from the agent who signed the original document.*
 - b. Who to contact and where to send information for withdrawal.
 - c. Include: *Once open, documents become property of the district.*
 - d. When documents are opened, they become public information and any restrictions put upon the district regarding the sharing of information or duplicating copies after opening will be grounds to reject the Bid.
- 4. Inquiry regarding bid
 - a. How inquiries must be submitted (i.e. all inquiries regarding the bid must be submitted in writing, to whom, by when, and how you will respond.)
 - b. When and how responses will be posted
- 5. Pre bid conference (optional): The Pre-Bid Conference Call provides an overview of the Bid Process and the only opportunity for a direct Q&A session with bidders.
 - a. Time, date, location or a virtual meeting link
 - b. The purpose of the pre-bid (example below)
 - c. Discussion items at the pre-bid conference will include, but are not limited to:
 - i. Order Placement
 - ii. Delivery
 - iii. Estimated Quantities to be Purchased
 - iv. Bidding Additional Items/Variations
 - v. Request for bid extension/price extension

6. Award: Note- A point system or award rubric is required for an RFP. An IFB doesn't use a point system but geographic preference points can still be used to determine final award for an IFB.

RFP Only:

- a. List any criteria related to the award such as site visits to farms, what award is based on i.e. pricing, vendor performance, ability to deliver, financial responsibility of vendor, ability to meet requirement of the bid including providing a food safety plan.
- b. Describe point system/rubric for determining award. Examples include product quality, delivery, packaging and labeling, farm tour or classroom visits, can provide traceability on farm, delivered within specified time of harvest.

RFP or IFB:

- c. Right to award to more than one vendor
- d. Geographic preference points ([USDA Geographic Preference Guide](#))
 - i. Describe any geographic preference points:
 1. For example: 1 preference point=1 penny. Preference points do not change pricing, but can help determine a winner by deducting the points from the cost when determining lowest bid.
 - ii. Preference points using geographic preference for Colorado grown could prioritize Colorado farmers in the award process. Purchases made from producers outside of Colorado will not be allowable in the Local Food Program but could be purchased through the Nonprofit Food Service Account.

Part 2: GENERAL SPECIFICATIONS

See [Sample Solicitation Language document](#) which includes exact language to use for the contract provisions listed below.

1. Contract period: List beginning and end dates of the contract.
2. Contract pricing: The price per unit plus fixed delivery fees must remain firm for the full contract period. Delivered pack sizes must be included with pricing.
3. Contract renewal terms: Many contracts are for one year, with options of up to 4 renewal years following the initial contract. Renewal options are sponsor choice.
4. Piggybacking: Are you allowing another district to utilize this contract to form their own contract with the vendor under the same or similar terms? Best practice would allow a vendor the option to accept or reject piggybacking.
5. Contract cancellation: Define your process.
6. Vendor performance:
 - a. Include: *If the vendor is unable to perform under the terms of the contract, the Districts reserve*

This institution is an equal opportunity provider.

the right to cancel this contract.

7. Delivery guarantee: What is the requirement if a vendor cannot deliver a product on time? How much notice do you expect?
8. Delivery instructions:
 - a. Create and include a delivery location document and include as appendix and in this section list requirements of delivery. Examples include location, how often, invoices requirement upon delivery, inspection upon delivery, right to refuse if unacceptable quality, how delivery discrepancies are documented on invoice, requirement of labeling of boxes.
9. Quality assurance
10. Food safety: ([USDA FNS FTS Food Safety](#))
 - a. Do you require certification, food safety plan and/or on-site farm visits to be included with bid documents?
 - b. Traceability-do you require cases to be labeled with farm name, product, date harvested, date packed?
11. Insurance: Do you require proof of insurance? If so, how much product liability insurance is required?
12. Payment terms: List your district's requirements
13. Compliance with laws: All items must comply with all applicable Local, State and Federal laws pertaining thereof.
14. [Protest procedures](#)
15. Variances/options for adding goods or services
 - a. List any requirement related to variances
16. Procedure for recall or substitutions:
 - a. If a product is recalled, list your expected time frame for notification. The notification should include information related to: the product being recalled, the reason for the recall, and any product tracking information available.
 - b. If a product will be substituted, list your time frame for notification. Similar substitutions will be considered when offered at the same price as/lower than the originally specified item.
17. Other contract provisions (reference [Sample Solicitation Language](#) document for language and requirements):
 - a. Buy American- Even though this bid is for local food, the USDA requires Buy American language.
 - b. Termination for Cause and Convenience
 - c. Clean Air Act and the Federal Water Pollution Control Act
 - d. Debarment and Suspension
 - e. Byrd Anti-Lobbying Amendment
18. Product changes or substitutions: Include language to explain the value through LFP, possible award to multiple vendors, define ability to increase award amount to an individual vendor based on product availability etc. Changes to quantity levels may be allowed if preapproved by the district and included

in the bid document.

Part 3: APPENDIX EXAMPLES

Personalize the below appendix items to fit the individual needs of your sponsor and programming. You may not need to use all provided appendix items and you may want to include items not shown in these samples.

Appendix A: Acceptance Form

ACCEPTANCE

1. The Vendor agrees to comply with all Federal, State and local laws, ordinances, and all applicable rules, regulations and standards.
2. Participating Districts are tax-exempt. Exemptions forms will be issued upon request.
3. The Vendor Certifies that this Proposal is made without prior understanding, agreement, or connection with any corporations, firm or person submitting a Proposal for the same materials., supplies or equipment and is, in all respects, faire and without collusion or fraud. The vendor understands that collusive bidding is a violation of Federal law and can result in fines, prison sentences and civil damage awards. The Vendor further agrees to abide by all conditions of this Proposal.

SIGNED: _____

PRINTED NAME: _____

VENDOR NAME: _____

ADDRESS: _____

BUSINESS PHONE: _____

BUSINESS EMAIL: _____

Appendix B:

Delivery Locations

Include list or chart of all location names and addresses.

Appendix C:**School District Name Farm to School
Conventional Grower/Produce Food Safety Checklist
2024-2025 School Year****Producer Information**

Vendor Name: _____

Contact Name: _____

Is the contact listed the same person to oversee food safety? ☐ Yes ☐ No

If no, please provide us the food safety contact name: _____

Vendor Address: _____

City: _____ State: _____ Zip: _____

Business Phone: _____

Cell Phone: _____

Email: _____

Preferred method of communication: ☐ Business Phone ☐ Cell Phone ☐ Email

Date this Safety Plan was completed (dd/mm/yyyy): _____

Total Acres Farmed/Ranched: _____

Do all products you sell come from this farm? ☐ Yes ☐ NoIf no, does this other location have a food safety plan? ☐ Yes ☐ No

Please indicate what products come from another location: _____

Would you be interested in participating in a Farm to School activity with Greeley-Evans School District 6 (including farm field trips, school cafeteria/classroom visits, Colorado Proud School Meal Day activities, etc.)? ☐ Yes ☐ No

Additional Vendor Participation Information: _____

Do you have promotional/marketing materials that you are able to share with Greeley-Evans School District 6

District 6 (e.g. posters, flyers, stickers, etc.)? ☐ Yes ☐ No

Additional Promotional/Marketing Materials Information: _____

Other Information: _____

Appendix D:

School District Name Farm to School Fresh Produce Anticipated Usage 2024-2025 School Year

TOTALS			
<u>Produce</u>	Estimated Monthly Usage	Unit	Estimated Usage (Months):
Apples (whole fruit)	100,000K	ea	August through May
Asparagus*	0	lb	Seasonal
Arugula	0	lb	August through May
Beans, dry black	0	lb	August through May
Beans, dry garbanzo	0	lb	August through May
Beans, dry pinto	0	lb	August through May
Beets	0	lb	August through May
Bell Peppers, green	700	lb	August through May
Bell Peppers, red	500	lb	August through May
Bell Peppers, yellow	0	lb	August through May
Blackberries	160	lb	Seasonal
Blueberries	160	lb	Seasonal
Broccoli Florets	1,200	lb	August through May
Brussel Sprouts	0	lb	August through May
Cabbage*, green	0	lb	August through May
Cabbage, red	400	lb	August through May
Cantaloupe* (avg 4lb ea)	0	lb	Seasonal
Carrots, large	0	lb	August through May
Carrots, baby	7,800	lb	August through May
Cauliflower (white, orange, and purple)	620	lb	August through May

This institution is an equal opportunity provider.

Celery, sticks	3,500	lb	August through May
Cherry*, fresh	0	lb	Seasonal
Chili Peppers (Anaheim, jalapeno)	150	lb	Seasonal
Cilantro	23	lb	August through May
Collard Greens	0	lb	August through May
Corn, sweet	4,500	ears	Seasonal
Cornmeal, yellow	0	lb	October through March
Cucumbers	8,200	lb	August through May
Elderberries	0	lb	Seasonal
Bell Peppers (red and green)	1,325	lb	August through May
Garlic, whole, peeled	50	lb	August through May
Grapes, table	4,700	lb	August through May
Green Beans	0	lb	August through May
Green Chilies	0	lb	August through May
Honey	0	lb	Seasonal
Honeydew* (avg 4 lb ea)	0	lb	Seasonal
Jicama	0	lb	August through May
Kale*	0	lb	August through May
Lentils	0	lb	August through May
Lettuce, loose leaf/mix	3,200	lb	August through May
Lettuce*, Romaine head	0	ea	August through May
Microgreens	0	lb	August through May
Mushrooms, button*	0	lb	August through May
Onions, yellow	750	lb	August through May
Onions, red	125	lb	August through May

Onions, white	0	lb	August through May
Peaches	12,000	ea	Seasonal
Pears	10,000	ea	Seasonal
Plums*	0	ea	Seasonal
Potatoes, Yukon Gold	1,100	lb	August through May
Potatoes, red	125	lb	August through May
Pumpkin, carving	0	ea	October
Radishes*	0	lb	Seasonal/Specialty Offering
Raspberries*	0	lb	Seasonal
Shallots, peeled	0	lb	August through May
Spinach	625	lb	August through May
Strawberries*	0	lb	Seasonal
Sweet Potatoes*	0	lb	Seasonal/Specialty Offering
Sugar Snap Peas	135	lb	August through May
Tomatoes, cherry	200	lb	August through May
Tomatoes, slicing	1,200	lb	August through May
Watermelon* (avg 5 lb ea)	0	lb	Seasonal
Yellow Summer Squash*	0	lb	August through May
Zucchini	110	lb	August through May

School District Name Farm to School Prime Vendor Invitation to Bid Virtual Pre-Bid Conference

January 8, 2024 / 11:00AM

Zoom Meeting Link: _____

Meeting ID: 861 8858 5075

Passcode: 582874

Dial by your location: +1 719 359 4580

Facilitator: _____

AGENDA

- Intent of this Request for Proposal (RFP)
 - RFP requires that all pricing provided be fixed for the contract term
 - Focus will be placed on awarding all items to one Prime Vendor
- Review of Timeline
 - Bid Submission
 - Bid Evaluation
 - Award
 - Contract Development
- Required Components of a Complete Bid Submission
 - Vendor Bid Form and Bid Price Spec Sheet
 - Vendor Pricing Spreadsheet
 - Bidder Contact Information
 - Independent Price Determination Certification
 - Suspension & Debarment Certification
 - Lobbying Certification
 - Disclosure of Lobbying Activities
- Bid Logistics
 - Order Placement
 - Delivery
 - Estimated Quantities to be Purchased
 - Bidding Additional Items/Variations
 - Request for Bid Extension/Price Extension
- Partnership Opportunities
 - New and Improved Processes for Farm to School
 - Customer service expectations

Appendix F:

Bid #2024 Farm to School Bid Award Rubric (for RFP only)

[illegible]

Appendix F:

Bid #2024 Farm to School Bid Award Rubric (for RFP only)

Company Name	Proposed Pricing (Max Points: 50)	Geographic Preference (Max Points: 10)	Evidence of Food Safety Plan (Max Points: 10)	Delivery Fee (Max Points: 10)	Delivery Minimums (Max Points: 10)	CDA Certified CO Proud Member (Max Points: 10)	Self-Identified HUFR (no points) YES or NO	Total Points Awarded (total/100)

