

# FACILITATOR GUIDE



## AGRICULTURAL PRODUCERS' TOOLKIT

Bringing the Farm to School



NATIONAL CENTER  
FOR APPROPRIATE  
TECHNOLOGY





# FACILITATOR GUIDE

## **Bringing the Farm to School: Agricultural Producers' Toolkit**

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# I. BRINGING THE FARM TO SCHOOL



## Bringing the Farm to School

### About This Program

In 2019, the U.S. Department of Agriculture's Food and Nutrition Service (FNS) established a three-year cooperative agreement with the National Center for Appropriate Technology (NCAT) and the National Farm to School Network (NFSN) to develop a farm to school training program for agricultural producers. There is significant untapped market potential for producers to sell their products to K-12 schools and in early care and education (ECE) settings. The goal of the program is to give agricultural producers the training and tools to build their capacity to launch or grow efforts to market to schools, therefore increasing sales to schools for farmers while expanding farm to school activities for students in schools and communities across the nation.

To maximize capacity-building for a wide variety of agricultural producers, a [Needs Assessment](#) was conducted to gauge existing knowledge, skills gaps, and specific needs that this new farm to school training program curriculum should address. The needs assessment found that producers seek support and targeted training on the following topics, which have been directly integrated into the training curriculum in addition to other key farm to school issues:

- Understanding school food purchasing and regulations
- Relationship building and communicating with school buyers
- Improving logistics for marketing and distribution
- Addressing product supply and demand challenges

The program supports a wide variety of agricultural producers, including farmers, fishers, ranchers, food processors, and other local food businesses. Using a tiered, train-the-trainer model, the program prepares State agencies and other farm to school representatives with the knowledge, resources, and skills necessary to implement the Local Producer Training curriculum in their states.

[Key program partners](#) include USDA FNS Office of Community Food Systems, National Center for Appropriate Technology, National Farm to School Network, New York University, and an Advisory Council.

#### Advisory Council Members

- University of Wisconsin, Madison – Center for Integrated Agricultural Systems
- Community Alliance with Family Farmers
- Cornell Cooperative Extension
- Farmer Veteran Coalition
- Georgia Organics
- Intertribal Agriculture Council
- Michigan State University – Center for Regional Food Systems
- National Farmers Union Foundation
- National Young Farmers Coalition
- North Dakota Department of Public Instruction
- State of Washington Department of Agriculture
- Western Montana Growers Cooperative

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# About This Toolkit

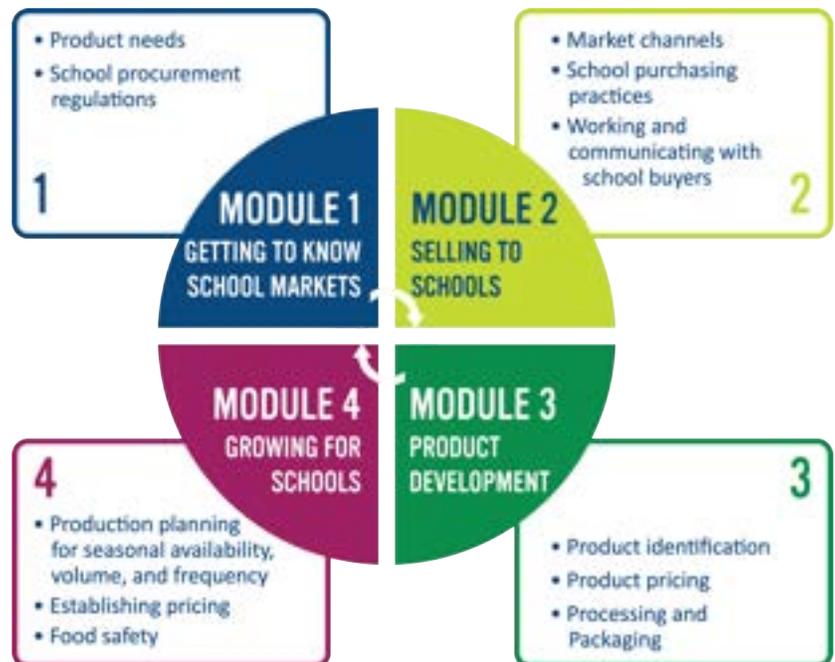
*Bringing the Farm to School Agricultural Producers' Toolkit* provides facilitators with multiple resources that can be used to plan and implement your Local Producer Training. This toolkit includes three primary sections:

- **Facilitator Guide:** This guide will assist you in facilitating your Local Producer Training. The *Bringing the Farm to School Agricultural Producer Training* curriculum (included in Section 2 of this guide) is organized into four training modules. Each module includes presentation slide decks and detailed lesson plans with talking points, prompts, and activities you can use. Think of the *Facilitator's Guide* as your starting place and a resource with everything you need as a facilitator to *review before* and *reference during* your Local Producer Training.
- **Planning and Outreach Guide:** This guide contains planning tools and customizable materials to support preparation for your Local Producer Training and outreach to producers. Think of the *Planning and Outreach Guide* as everything you need to plan, prepare, and share before your Local Producer Training.
- **Producer Workbook:** The workbook is for producers to use during the Local Producer Training in conjunction with copies of the slide decks, to help producers follow along and relate content back to their farm or operation. You can customize this by choosing whichever worksheets best fit your audience and time allowance. The *Producer Workbook* also includes the [School Business Action Planning Guide \(Appendix A\)](#) to aid producers in outlining next steps for accessing school markets.

## Training Approach

The *Bringing the Farm to School* training program was designed to maximize learning that is peer-led, experiential, and action-oriented. In addition to the lesson plans, slide decks, and Producer Workbook worksheets for each module, this approach includes the following components:

- **Experiential Learning & Applied Activities:** Applied activities and experiential learning opportunities are embedded throughout the curriculum and are intended to reinforce core concepts by bringing them to life through real-world examples and shared experiences. Suggested applied activities include interactive worksheets, small-group discussions, and Q & A's. Peer-led and experiential learning opportunities include producer panels or facilitated discussions, as well as site visits to local farms or schools engaged in farm to school.
- **Farm to School Perspectives Panel:** We advise having at least one [panel](#) or facilitated group discussion featuring local farmers and school market representatives during each Local Producer Training. These discussions create an important opportunity for incorporating local context, answering specific marketing questions, and addressing common misconceptions. In addition, they are a great way to emphasize peer learning and build in networking time between producers and school market representatives.
- **Site Visits:** The Local Producer Trainings have been designed to provide experiential education through site visits to local farms. We recommend that you arrange for a visit with a farm or food business actively engaged in farm to school sales. Make sure the host is aware of the curriculum components beforehand, so the visit can reinforce the principles learned in the classroom. Please see the [Planning and Outreach Guide](#) for further guidance on arranging site visits.
- **School Business Action Planning Guide:** Producers will leave this training with an "action plan" – an outline of self-identified long-term goals, supporting short-term strategies, and action steps needed to move forward with adapting their farm or business operations to access school markets. The *School Business Action Planning Guide* is a separate booklet to be used in conjunction with the *Producer Workbook*.



## Curriculum Design & Producer Learning Priorities

The Needs Assessment findings shaped The Bringing the Farm to School training program, and the priorities identified by stakeholders are reflected in the core concepts and producer learning objectives in each training module. The first half of the curriculum—Modules 1 and 2—focuses on understanding and accessing school markets, while the second half—Modules 3 and 4—is dedicated to adapting producer operations for school sales.

### What is Farm to School?

Farm to school enriches the connection that communities have with fresh, healthy food and local food producers by changing food purchasing and education practices at schools and in early care and education (ECE) settings. Farm to school and ECE provides students with access to healthy, local foods, as well as educational opportunities such as school gardens, cooking lessons, and farm field trips. Farm to school/ECE programs also strengthen local food systems and support vibrant communities by building relationships between large purchasers—like schools—and agricultural producers.



### How Producers Support Farm to School:

- Quality local products
- Cafeteria, classroom, and on-farm educational opportunities
- Agricultural expertise and school garden support

Farm to school implementation differs by location but is generally understood to include one or more of the following:

- **Procurement:** local foods are purchased from a farm or food hub, promoted, prepared, and served in the cafeteria or as a snack or taste-test
- **Education:** students participate in educational activities related to agriculture, food, health, or nutrition, which may include an in-class or school garden, visit from a farmer, or a classroom field trip to a producer's farm or place of business
- **School gardens:** students engage in hands-on learning through gardening, providing additional opportunities for farmers to engage in mentorship, management of the garden, or on-site education.

The impacts and benefits of farm to school are amplified when all three activities are used together.

### Why Farm to School?

**We know that most trainers already understand the benefits of farm to school.** However, this section can function as a useful refresher and contains information for overall training framing that may be passed along to producers or anyone else on your training team or in your agency.

Across the country, schools are increasingly interested in sourcing local, high-quality products from all types of agricultural producers. Farmers, ranchers, fishers, and food processors can access this growing market and play an important role in providing local foods to schools. When agricultural producers and school foodservice staff work together, farm to school can provide new market opportunities for producers and nourish students with locally produced foods.

Farm to school can be a strategy for building strong schools and just food systems. One of the central tenets of farm to school is connecting with locally and regionally produced foods to be served in school meals and child nutrition programs, including in K-12, ECE, and summer settings. It's more than procurement – it's collaboration. It takes a lot of partnership

and teamwork to do this, and there's value for the community in these efforts. Procurement of local foods not only provides students access to healthier school meals, but it can advance income generation and access to land ownership for marginalized food producers.

**Schools can offer strong market opportunities for agricultural producers.** With more than 30 million students participating in the United States Department of Agriculture's (USDA) National School Lunch Program each day that school is in session, schools provide large, stable, and long-term markets for producers. Some schools spend more than 30% of their food budgets on local food. Considering that schools across the country spent a combined total of nearly \$10 billion on food for school meals in 2018, this is a significant market with strong potential that farmers can tap into.

**Farm to school is a growing movement.** According to the 2015 USDA Farm to School Census ("Census"), schools across the country purchased \$789 million in local foods during the 2013-2014 school year, an increase of 105% over the 2011-2012 school year.

**Schools want to work with local agricultural producers.** At the national level, 42% of school districts that responded to the Census were operating farm to school programs as of the 2014-2015 school year, and another 16% – more than 2,000 districts – had plans to start such a program. Micro-purchases of local products for taste tests or salad bar features are great ways for schools and local producers to forge new relationships.

**Helping schools find and procure locally and regionally produced food is directly tied to USDA's strategic plan and is a key component of USDA's Child Nutrition Programs.** Farm to school is directly in line with USDA's mission and it considers farm to school to be inclusive of and beneficial to many types of producers, such as farmers, ranchers, and fishers, as well as many types of food businesses (e.g. food processors, manufacturers, and distributors) and other value-added operations.

### Why farm to school?



Kids WIN



Farmers WIN



Communities WIN

Farm to school benefits everyone from students, teachers, and administrators to parents and producers.

- **KIDS WIN**—Farm to school provides all kids access to nutritious, high-quality local food so they are ready to learn and grow.
- **FARMERS WIN**—Farm to school can serve as a significant financial opportunity for agricultural producers by opening doors to an institutional market worth billions of dollars.
- **COMMUNITIES WIN**—Buying from local producers and processors creates jobs, strengthens the local economy, and builds vibrant and connected communities.

For more information about the **benefits of farm to school** and the **basics about selling local food to schools**, check out the [Benefits of Farm to School factsheet](#) from National Farm to School Network and the [Selling Local Food to Schools: A Resource for Producers](#) factsheet from the USDA Office of Community Food Systems.

## Getting Started

**We all have a role in supporting local producers.** As a farm to school leader in your region, you are the right person to bring this training program home to your community. This Local Producer Training is designed for you to share expertise from your own lived experience working in the farm to school movement. Whether your role is typically focused on providing producer training and technical assistance, administering and supporting child nutrition programs, or strengthening local food systems, you bring important skills, valuable relationships, and unique perspectives to this training program.

Here are a few suggestions to help you, as a lead facilitator, prepare for your Local Producer Trainings and begin *Bringing the Farm to School Training Program*.

## 1. Know the Content

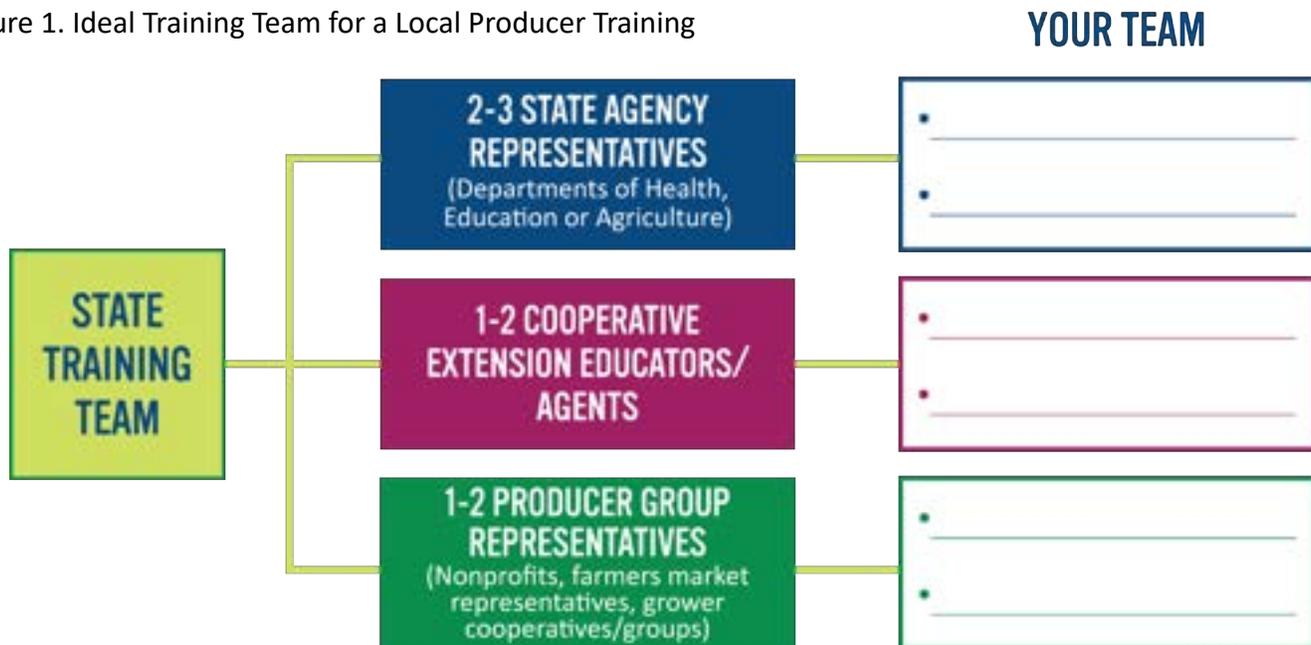
Take time to review each module in this training curriculum. It is imperative that you and your training team have a clear understanding of the curriculum content before hosting your Local Producer Training. Pay special attention to the core concepts identified in each lesson plan, which are topic areas trainers in which should have background knowledge to successfully facilitate the producer-training curriculum. Each module also contains resources for strengthening your knowledge on these topic areas—look in the Digging Deeper section of Appendix A, “[Training Tools for Facilitators](#),” and Appendix B, “[Producer Tools](#).” Be sure to also check out the Producer Workbook to better understand the training resources for participants.

## 2. Build Your Training Team

Although it is possible that one person has the skills needed to facilitate all of the content included in this curriculum, building a training team within your region will ensure that you have the expertise needed to provide an impactful Local Producer Training. We recommend starting with your current working relationships, then reaching out to new partners to address any gaps in knowledge, skills, or perspectives that you identify when preparing for your training. As shown in Figure 1, be sure to include State agency representatives, Agricultural Extension Educators or Agents, producer support organization staff, and state farm to school positions.

*For more considerations on building your training team, including expertise, availability, and diversity, check out this [Building Your Training Team checklist](#).*

Figure 1. Ideal Training Team for a Local Producer Training



## 3. Make It Local

One size does not fit all – take time to customize the content of this training program! It’s critical that the topics covered meet the needs of the agricultural producers you are seeking to train. Check out the learning objectives and essential questions for producers in each lesson plan as well as the Producer Workbook: do these align with the needs of the producers you are seeking to train? Do the suggested activities reinforce these topics? Modify presentation slide decks to reflect the unique culture and context of your region, integrate local/regional program examples, include relevant regulatory information, highlight stories of success from local producers, and provide local resources for supporting producers.

## 4. Plan Your Agenda

You know the content, you’ve built your planning team, and you’ve identified how you’re going to customize your Local Producer Training. Now, it’s time to put logistics in place to bring these prep efforts to life. View the [Planning and Outreach Guide](#) for a step-by-step timeline with action items on how to plan the logistics of your Local Producer Training. A good starting place is to determine your training agenda, informed by the background work you’ve done in the steps above, as well as the activities in the [Producer Workbook](#). The ideal training time is two days; however, we understand that two full days in-person can be challenging to arrange for both training-team members and producers. Please consider these [sample agendas](#) that apply to various training scenarios as you plan your training.

## 5. Identify and Reach Your Audience

For tools on planning logistics and outreach for your training, see the [Planning and Outreach Guide](#) and resources below for serving the learning needs of your audience.

## 6. Plan for Action

This training takes a whole-farm approach to school sales, which can help producers consider the interrelated components for engaging in school sales in relation to their own priorities and values. Goal-setting from a whole-farm approach is not just about identifying production goals; it also includes lifestyle, community, financial, and farm-management goals.

The process for establishing these whole-farm goals will be through the [School Business Action Planning Guide](#) activities, which support producers in assessing their knowledge and skills, identifying potential action items, and outlining their short-term strategies aligned with long-term goals for farm to school sales. See [Producer Workbook, Appendix A](#).

**Action Planning** is embedded within the Local Producer Training curriculum in the following ways:

- **School business assessment:** to assess existing farm and business capacity, goals, and gaps;
- **End-of-module check-ins:** to quickly assess participants' content understanding based on *essential questions* related to *recommended action items* to support producer success in farm to school sales;
- **End-of-training School Business Action Plan:** to aid producers in constructing a set of action items for farm to school sales and next steps to pursue after they leave the training.

First, as part of the curriculum Introduction, every producer will complete the **school business assessment** included in the School Business Action Planning Guide section of the [Producer Workbook](#) (Appendix A). Once completed, the school business assessment will provide both producers and you, as the facilitator, a quick visual overview of participant experience and strengths, as well as gaps in knowledge, systems, and/or infrastructure that participants should focus on addressing throughout the training and incorporate into their business action plan.

At the end of each training module, producers will engage in “**Check-Ins**” to gauge their understanding of core concepts included in the Local Producer Training curriculum. Participants will answer **essential questions for producers**, which are simple yes/no statements geared towards **recommended action items** to support success in farm to school sales. These “**Check-Ins**” also provide you, as the facilitator, an important opportunity to assess your participants' progress towards the stated learning objectives, and to address additional questions that might come up when producers relate the content back to their operations.

The **School Business Action Planning Guide** will prompt producers to think about the specific short-term strategies, action steps, resource needs, timeline, and responsible parties required to support accomplishing the identified strategy. The guide ends with a review of the producer's short-term actions and reflection on long-term strategies to be successful in school sales.

Producers will leave this training with a complete School Business Action Plan including several long-term goals for accessing school markets, supporting short-term strategies and detailing action steps needed to move forward in alignment with their whole-farm goals for farm to school sales.

Considerations for supporting producers when developing a school business action plan:

- Producer motivations for farm to school sales (alignment with whole-farm goals and values)
- Potential benefits of farm to school for producers (increased sales, potential for higher-price sales at more flexible volumes than large-scale wholesale bulk sales, reduced risk from diversified marketing, promotion that helps grow brand, opportunities for additional revenue through school partnerships such as supporting events or hosting farm tours)
- Making it work for farm businesses (break-even point needed to cover expenses and earn a profit)
- Establishing short-term strategies, long-term goals, and action steps for farm to school sales (planning for scaling-up, expanding infrastructure, improving operations, and/or updating marketing plan)
- Identifying resources, programs, and people to support farm to school goals (using resources from this training program)

# Best Practices for Facilitators

In order to ensure engagement among producer training participants, try to limit instances where you are presenting content directly from slides. You'll see examples throughout the Facilitator Guide of probing questions, case studies to reflect on, group activities, references to external materials and multimedia content (see *"How to Read and Use This Guide"* in Section II, page 9). Deliberately plan to use these methods every few minutes to minimize lecturing and facilitate engagement.

*"Facilitation means 'to make easy,' but most of the time, facilitating meetings and conversations feels like a daunting task. It can be intimidating to be expected to have all of the answers, capture discussion, and keep that same conversation going all at once. However, [...] facilitators don't have to have all of the answers or talk more than everyone else. In fact, it is often best when a facilitator does the opposite."* —People Centric Consulting Group

## Facilitation Tips<sup>1</sup>

- 1. Know your audience.** Is the group made up of mostly small vegetable growers? Ranchers? Farmers of color? New farmers? Knowing your audience can help you better guide discussions and prepare for likely challenges or questions. With your audience in mind, identify priorities in the agenda as well as sections that can be cut for time, or areas where additional content may be added, if needed.
- 2. Use the expertise already in the room.** Each Local Producer Training will bring together a diverse group of people with different perspectives, experiences, ideas, knowledge, and expertise. Facilitators should focus less on having all the answers and, instead, aim to make space for participants to share their expertise.
- 3. Encourage everyone to participate.** Asking questions and incorporating adult learning principles are key to fostering a learning environment where participants are happy to share their experience and knowledge. Additionally, responding to participants' input with positive reinforcement, rather than judgment, helps create a space where participants are encouraged to share and participate.
- 4. Plan for multiple learning styles.** Consider multiple approaches for connecting with visual, auditory, and hands-on learners. Additionally, consider the generational and cultural differences in your audience's learning styles (e.g., baby boomers vs. Gen X).

## Logistical Tips

- 1. Think about room set-up.** A café-style set-up may foster more conversation and collaboration than having everyone face the same direction in the room. Make sure to encourage participants to spread out evenly among the tables.
- 2. Create and share the agenda.** At the onset of your training, share the agenda (including timestamps) in a way that's visible to all participants – don't leave them wondering what's coming next and when. Stick to your agenda and the start/stop times identified. Offer periodic time checks.
- 3. Establish community agreements.** Start your training by crowd-sourcing a list of ground rules that everyone will stick to during the training. Encourage everyone to participate in the process of creating these community agreements and, as facilitator, model good behavior in sticking to them.
- 4. Give breaks.** Aim for at least 15 minutes of break for every two hours of learning. Access to outdoor spaces during breaks is a plus!
- 5. Build in time for networking.** The opportunity to meet and connect with others can be just as valuable as content for applied learning with experienced practitioners.
- 6. Be present.** Remember, you don't have to have all the answers and shouldn't do all the talking. Use these tips to help you foster a dynamic, collaborative, and participatory learning opportunity for everyone!

<sup>1</sup> Best Practices for Facilitators, People Centric Consulting Group. 2020. <https://blog.peoplecentric.com/blog/best-practices-for-facilitators>

Although community agreements should ideally be co-constructed, here are a few examples<sup>2</sup> to propose to the group:

- Acknowledge the gender, race, class, and heteronormative power dynamics in the room, as well as differences in farm size and experience level among producers
- One voice at a time
- Take space, make space
- Avoid industry language
- No one knows everything, but together we know a lot

## Adult Learning Principles

Leading a quality training is an art. Helping to connect content to learners, like all arts, has techniques that can be learned and principles to guide you. Most importantly, especially with adult learners, your job is to **set the stage for participants to do their own learning**. This training was designed with adult learners in mind: to *minimize* lecturing and *maximize* applied learning. As shown in Figure 2, it's important to find the balance between providing high-quality information, sharing concrete, relevant, multimedia examples, and giving participants space to connect to the content through their experiences.

Café-style is a type of classroom design that includes small, round tables where four to five participants sit, have space to write, and are still able to see the presenter. This format promotes discussion and a platform to share ideas and knowledge with a smaller group before sharing with the larger group.

Figure 2. Five Best Practices for Adult Learning<sup>3</sup>



## Facilitating Diverse Participation

Ensuring diverse participation in your training requires intentional decision-making regarding content, teaching style, and facilitation approach. Diversity might exist among participants in the form of race, age, physical ability, nationality, culture, gender identity, profession, or additional elements of lived experience—each of which can impact a participant's learning styles and preferences. You, as the facilitator, bring your own diverse experiences to the table, as well.

Overall accessibility must also be considered when planning event logistics—including timing, location, set-up, affordability—and promotion and outreach efforts. For more information about these components, see the *Planning and Outreach Guide*.

2 Community Agreements, Northeast Sustainable Agriculture Working Group. <https://nesawg.org/conference/community-agreements>

3 <https://nesawg.org/conference/community-agreements>. A Guide for Educators: Sustainable Agriculture through Sustainable Learning: Improving educational outcomes with best practices for adult learning, Northeast Sustainable Agriculture Research and Education, S. Bell and J. McAllister. 2012

# II. BRINGING THE FARM TO SCHOOL: AN AGRICULTURAL PRODUCERS' TOOLKIT GUIDE

## About This Guide

The *Bringing the Farm to School Agricultural Producers' Toolkit* curriculum is made up of four core training modules, as well as an introduction and conclusion. Each module includes a detailed lesson plan, curriculum outline, and customizable presentation slide deck.

- Introduction: The Power of Farm to School
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)
- Module 1: Getting to Know School Markets
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)
- Module 2: Selling to School Markets
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)
- Module 3: Choosing the Right Product to Sell to Schools
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)
- Module 4: Growing for School Markets
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)
- Conclusion: Planning for Action
  - [PPT Slide Deck](#)
  - [Curriculum Outline](#)

## How to Read and Use This Guide

Each training module lesson plan includes a **Facilitator Background Section** that outlines the following items to help you prepare for your local producer training:

- **Producer Learning Objectives** to check for understanding.
- **Key Terms and acronyms.** These terms are also compiled into one comprehensive [curriculum glossary](#) for easy reference.
- A list of **Core Concepts** for trainers with corresponding **Digging Deeper Resources** for facilitators, to support your training team's continued learning as you prepare for your local training.

Throughout the lesson plans, you will see the following components to support facilitators as you conduct your local producer training:

- **[Talking Points]** for each slide included in the corresponding presentation slide decks. These are intended to support diverse teaching approaches and help you minimize reading from the slides.
- **Facilitator Prompts** emphasize important information and instruction techniques to keep the content actionable for producers.
- **Regionalization Tips** indicate content areas that should be presented with local and/or regional examples and information. In many cases, the lesson plans provide placeholder examples. However, we strongly encourage you to customize the training as much as you can for your specific audience.
- **Applied Activities** include instructions, materials and tools, and suggested reflection questions to help connect content to the Producer Workbook.
  - Suggested videos illustrate the topics within regional context.
  - Weblinks provide opportunities for regionalization and group learning.

- **Worksheets** and templates listed within lesson plans are included in the Producer Workbook.
- **Action Planning** prompts are provided in the end-of-module “**Check-In**” sections found in the concluding section of each module.
- **Bringing the Farm to School Case Studies** identifies producer-focused case study resources intended to supplement content included in the lesson plans.

Remember, the **Producer Workbook** supports producer learning, and includes these items:

- **Case studies** referenced in the lesson plans that facilitate peer-led learning. These are multi-media resources (in written, video, and podcast format) that highlight how farmers have applied these concepts on their own farms or business operations.
- **Worksheets** and templates referenced within lesson plans, intended to apply the core concepts and support producer skill building.
- End-of-module “**Check-Ins**” to help producers assess their knowledge and support business action planning throughout the curriculum.
- **Digging Deeper Resources** for producers to address gaps in knowledge or skills identified by producers.

The accompanying **PowerPoint slide decks** align slide by slide directly with this Facilitator Guide. The slide decks are designed to be completely customizable and you should update each slide deck to meet your presentation needs and the needs of your audience. Recommendations and opportunities for customization include the following:

- Remove any slides or module sections that you do not plan to present. You can also add slides that include state or regionally specific content that is relevant for producers in your training.
- Create a *Let’s Play Jeopardy* interactive game. Each module begins with a *Let’s Play Jeopardy* game to support participants in learning and understanding key terms and vocabulary. Follow directions for **How to Create a PowerPoint Jeopardy Quiz** to create a customized game.
- Update any and all photos in the slide decks to feature photos of producers and farm to school initiatives in your state or region.
- Use videos or case studies that highlight producers in your region. Although there are many recommended videos and case studies throughout the slide deck and Facilitator Guide, you may wish to add or substitute videos and stories from your state or region.
- Add regional policy and program information. Throughout the modules, you will see **regionalization tips** prompting you to find additional information about state or regional programs, policies, or partners. Be sure to update or add to the slide deck to feature these regional customizations.
- Update your contact information. At the end of each slide deck, there is a place for the facilitator’s name and contact information, so participants can follow up with any questions.

# INTRODUCTION: THE POWER OF FARM TO SCHOOL

Estimated Time: 30-45 minutes

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>Introduction</b> Duration: 30-45 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand what farm to school is and how it can benefit them</li> <li>• Identify their motivations for selling to schools and how their farm goals align</li> <li>• Identify action planning as a tool for meeting their farm goals through farm to school sales</li> </ul>	<ol style="list-style-type: none"> <li><b>1. The Power of Farm to School: An Introduction to <i>Bringing the Farm to School</i> Producer Training Program</b></li> <li><b>2. Training Evaluation</b> <ol style="list-style-type: none"> <li>a. Overview</li> <li>b. Pre-survey</li> </ol> </li> <li><b>3. Icebreaker</b></li> <li><b>4. <i>Bringing the Farm to School</i> Producer Training Goal</b></li> <li><b>5. What is Farm to School?</b> <ol style="list-style-type: none"> <li>a. Three Core Elements</li> <li>b. Why Local Food in School Meals?</li> <li>c. How Schools Celebrate Local Food and Farmers</li> </ol> </li> <li><b>6. Benefits of Farm to School for Producers</b> <ol style="list-style-type: none"> <li>a. Producer Spotlights: Benefits of Selling to Schools for Your Operation</li> <li>b. Direct vs. Indirect Benefits</li> <li>c. Values Alignment</li> </ol> </li> <li><b>7. How Your Farm Goals Support Farm to School Sales</b> <ol style="list-style-type: none"> <li>a. Whole-Farm Planning and School Sales</li> <li>b. Business and Skills Assessment for Farm to School</li> </ol> </li> <li><b>8. Action Planning for Success: How Farm to School Can Help You Meet Your Farm Goals</b> <ol style="list-style-type: none"> <li>a. Action Planning: Setting Your Goals</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 1- 22)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• Producer Spotlight Discussion and Share-out</li> <li>• Action Planning: Setting Your Goals</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• School Business Action Planning Guide</li> </ul>

# MODULE 1: GETTING TO KNOW SCHOOL MARKETS

Estimated Time: 1 hour

Optional Content Estimated Time: 20 minutes

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>A. Child Nutrition Programs</b> Duration: 30 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the diversity of product needs for Child Nutrition Programs</li> <li>• Understand how Child Nutrition Programs process, prepare, and serve local foods</li> <li>• Determine what types of local products schools want to purchase</li> </ul>	<ol style="list-style-type: none"> <li>1. Introduction</li> <li>2. A Brief Overview of Child Nutrition Programs               <ol style="list-style-type: none"> <li>a. Child Nutrition Programs</li> <li>b. School Meal Programs by the Numbers</li> </ol> </li> <li>3. What Influences School Meal Program Purchasing?               <ol style="list-style-type: none"> <li>a. A Look at Child Nutrition Program Meals</li> <li>b. Meal Components and The Cost of a School Meal</li> </ol> </li> <li>4. The Diversity of School Meal Programs               <ol style="list-style-type: none"> <li>a. Product Needs: One Size Does Not Fit All</li> <li>b. School Meal Program Kitchens</li> <li>c. School Meal Program Models</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 1- 23)</b> <b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• School Meal Memories (Estimated Time: 5 minutes)</li> <li>• What About My Product? (Estimated Time: 3 minutes)</li> <li>• Getting to Know Your Local School Market (Estimated Time: 10-15 minutes)</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Farm to School in Action Video               <ul style="list-style-type: none"> <li>— <a href="#">Regenerating Paradise, Hawaii Center for Food Safety</a> (Dash and Erika Kuhr, HIP Agriculture)</li> <li>— <a href="#">Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems</a> (Mary Brower, Blue Stem Farm)</li> <li>— <a href="#">Farm to School in the Garden State</a> (Northeast Organic Farming Association of New Jersey)</li> </ul> </li> <li>• Video Tour of a Child Nutrition Program Kitchen               <ul style="list-style-type: none"> <li>— <a href="#">Collards in the Cafeteria</a> (Gaston County, North Carolina)</li> </ul> </li> <li>• Worksheet 1A: Getting to Know Your Local School Market</li> </ul>
<p><b>B. Local Food Sourcing and Procurement In School Meal Programs</b> Duration: 30 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the basics of how school districts source and procure local foods for school meal programs</li> </ul>	<ol style="list-style-type: none"> <li>1. The Farm to School Supply Chain               <ol style="list-style-type: none"> <li>a. What Is “Local”?</li> <li>b. How Schools Source and Incorporate Local Foods</li> <li>c. School Food Service Cycles</li> </ol> </li> <li>2. School Food Procurement 101               <ol style="list-style-type: none"> <li>a. Procurement Standards</li> <li>b. Procurement Methods</li> <li>c. Procurement Process</li> </ol> </li> <li>3. Conclusion and Next Steps for Module 1               <ol style="list-style-type: none"> <li>a. Applied Activity — School Food 101 Game</li> <li>b. Questions for Reflection</li> <li>c. Action Planning</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 24-44)</b> <b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• Finding the Right School Meal Program for You: Case Study Review and Discussion (Estimated Time: 15 minutes)</li> <li>• School Food 101 Game (Estimated Time: 5 minutes)</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Worksheet 1B: Finding the Right School Meal Program for You</li> <li>• Farm to Child Nutrition Program Case Studies               <ul style="list-style-type: none"> <li>— Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)</li> <li>— Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&amp;R Poultry and Produce)</li> <li>— The Right Product and The Right Partnership (Kenneth Sweat, Sweat’s Produce)</li> </ul> </li> </ul>
<p><b>OPTIONAL CONTENT</b> <b>C. Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs (CACFP and SFSP)</b> Duration: 20 minutes</p>		<ol style="list-style-type: none"> <li>1. The Child and Adult Care Food Program and the Summer Food Service Program               <ol style="list-style-type: none"> <li>a. Child and Adult Care Food Program (CACFP)</li> <li>b. Summer Food Service Program (SFSP)</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 1-11)</b></p>

## MODULE 2: SELLING TO SCHOOL MARKETS

Estimated Time: 2 Hours

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>A. Farm to School Market Channels</b></p> <p>Duration: 45 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>Identify the best market channels for selling to schools, based on their operation's capacity and goals</li> </ul>	<ol style="list-style-type: none"> <li><b>1. Introduction</b> <ol style="list-style-type: none"> <li>Overview of Farm to School Market Channels</li> <li>How Does Your Product Get to the School?</li> </ol> </li> <li><b>2. Intermediated Market Channels</b> <ol style="list-style-type: none"> <li>Local Retail Outlets</li> <li>Food Hubs</li> <li>Regional Distributors</li> <li>National Wholesale Distributors</li> </ol> </li> <li><b>3. Direct-to-School Market Channels</b> <ol style="list-style-type: none"> <li>School Buyers</li> <li>Collective Purchasing Models</li> <li>Benefits &amp; Drawbacks</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 1-20)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>Full Group Activity: Exploring Food Hubs (10 minutes)</li> <li>Wrap-Up: Choosing the Market Channel Mix That Works Best for You</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>Local and/or regional food hub list or map</li> <li>Worksheet 2A: Common School Vendor Requirements</li> </ul>
<p><b>B. Selling to School Districts</b></p> <p>Duration: 60-75 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>Understand common product-quality standards for school markets</li> <li>Understand how to meet common vendor requirements of school markets</li> <li>Understand how to work effectively with school buyers</li> </ul>	<ol style="list-style-type: none"> <li><b>1. Selling to School Districts</b> <ol style="list-style-type: none"> <li>Understanding School Solicitations</li> <li>Finding School Solicitations</li> <li>Exploring Product Specifications</li> <li>Common Vendor Requirements</li> <li>Responding to School Solicitations Market Channel Assessment</li> <li>Connecting with School Buyers</li> <li>Approaching School Nutrition Directors</li> </ol> </li> <li><b>2. Conclusion &amp; Next Steps</b> <ol style="list-style-type: none"> <li>Choosing the Market Channel Mix that Works Best for You</li> <li>Action Planning: End-of-Module Check-In</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 21-32)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>Small-Group Activity: Exploring Product Specifications (15 minutes)</li> <li>Pair and Share: Practice responding to school solicitations (20 minutes)</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>Appendix C: Sample Solicitation (or use a local example!)</li> <li>Worksheet 2B: School Market Readiness Evaluation</li> <li>Special materials needed: list of local food products for small groups</li> <li>Worksheet 2C: School Solicitation Worksheet</li> <li>Worksheet 2D: School Nutrition Director Meeting Guide</li> <li>Special materials needed: School Solicitation Packet (Appendix C)</li> </ul>

# MODULE 3: CHOOSING THE RIGHT PRODUCT TO SELL TO SCHOOLS

Estimated Time: 1 hour

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>A. Choosing the Right Product</b> Duration: 30 minutes</p>	<p>Following this session, producers will:</p> <ul style="list-style-type: none"> <li>Identify the products and amounts that schools might purchase, based on the previous lesson on selling to schools</li> </ul>	<ol style="list-style-type: none"> <li><b>1. Introduction</b> <ol style="list-style-type: none"> <li>Identifying Your Product and Volume Based on the School's Needs</li> </ol> </li> <li><b>2. What to Grow</b> <ol style="list-style-type: none"> <li>Understanding menus and preferences</li> <li>Rethinking Volume- Scale and Frequency of School Deliveries</li> </ol> </li> <li><b>3. School's Food Needs</b> <ol style="list-style-type: none"> <li>School Cooking Infrastructure</li> <li>How Often</li> <li>Special Events- Crunch Time; Farm to School Month</li> </ol> </li> </ol>	<p><b>Slide Deck (slides 1-16)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>Discussion on Products based on Modules 1-2 (5 minutes)</li> <li>School Menu Activity: Bring a local/ regional school menu. Look at sample school menus and have producers brainstorm what they might offer a school, based on a given equipment/labor/logistical setup.</li> <li>Values Pitch Roleplay (10 minutes)</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>Sample School Menu—get this locally!</li> <li>Video and Written Case Study— Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, AR School District)</li> </ul>
<p><b>B. Product Development</b> Duration: 30 Minutes</p>	<p>Following this session, producers will:</p> <ul style="list-style-type: none"> <li>Learn how to assess which of their current products fit into school menus</li> <li>Learn how to assess some value-added options for their farm</li> </ul>	<ol style="list-style-type: none"> <li><b>1. What Range of Products Works with the School District's Need</b> <ol style="list-style-type: none"> <li>Raw/Unprocessed Products</li> <li>Lightly Processed (chopped, frozen)</li> <li>High Value-Added: Pre-Cooked or Processed</li> </ol> </li> <li><b>2. Options for Processing Raw Products Off-farm</b> <ol style="list-style-type: none"> <li>Regional Processing Kitchens</li> <li>Timing</li> <li>Investing in Infrastructure for Minimal Processing</li> </ol> </li> <li><b>3. Financing Your Value-Added Products</b></li> <li><b>4. Considering Costs and Pricing</b></li> </ol>	<p><b>Slide Deck (slides 17-37)</b></p> <p><b>Suggested Activity:</b> (10 minutes) Producers work in a group or individually on the Product Planning Chart.</p> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>Worksheet 3A: Product Planning Chart</li> <li>Video—Partnerships Yielding Healthy Food In Oregon Schools: Umi Organics and Camas Country Mill (Lola Milholland, Umi Organics and Tom Hunton, Camas Country Mill)</li> </ul>

# MODULE 4: GROWING FOR SCHOOLS

Estimated Time: 2.5 hours

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>A. Business Planning</b></p> <p>Duration: 20 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Know how to determine if selling to schools is right for them, through Whole-Farm Planning decision making</li> <li>• Understand and be familiar with tools that can help them determine if the school price point works for the products they have identified for school markets</li> </ul>	<ol style="list-style-type: none"> <li>1. Review Farm Goals and Farm to School Sales</li> <li>2. Are you Ready?</li> <li>3. Understanding Your Break-even Point</li> <li>4. Using Enterprise Budgets to Determine Break-even Price</li> <li>5. Return on Investment</li> <li>6. Cost Calculators</li> </ol>	<p><b>Slide Deck (slides 1-10)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• Producers work in groups to outline (15 minutes) enterprise and break-even price point for products they will be selling to schools. (Group by vegetable and livestock); or</li> <li>• Producers work alone on Worksheet 4A</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Case study: Is Farm to School Right for You; Cattail Organics</li> <li>• Worksheet: 4A Business Planning Considerations for School Sales—Break-even Price and Return on Investment</li> </ul>
<p><b>B. Scaling Up Production- Meeting Increased Demand For School Markets</b></p> <p>Duration: 30 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the functional farm logistics of increasing production to meet increased demand.</li> <li>• Examine the appropriate scale, workload, equipment, land needs, and regulatory aspects needed to scale a farm to higher production</li> <li>• Understand the scale and efficiency standards within farm management systems in order to meet school buyer requirements</li> <li>• Evaluate the finances and marketing characteristics of a successfully scaled-up farm</li> </ul>	<ol style="list-style-type: none"> <li>1. Understanding Scales of Production</li> <li>2. Sustainable Growth</li> <li>3. Labor</li> <li>4. Selling to Schools – Special Considerations</li> <li>5. Meeting the Budget Needs of Schools</li> <li>6. Meeting School Grading, Packaging, and Labeling Requirements</li> <li>7. Food Safety</li> <li>8. Managing Risks with Insurance</li> </ol>	<p><b>Slide Deck (slides 10-23)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• Group discussion: What is your farm’s weakest link? (5 minutes)</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Worksheets: 4B Scaling Up Production for School Markets—Weakest Link and Strategies for Improvement</li> </ul>
<p><b>C. Crop Production and Planning</b></p> <p>Duration: 30 minutes.</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand the elements of successful crop planning to meet school demand</li> <li>• Demonstrate crop planning based on demand, yield projections, and production goals</li> <li>• Assess planting schedules for sustained harvest</li> </ul>	<ol style="list-style-type: none"> <li>1. Planning and Goals</li> <li>2. Planting Plan</li> <li>3. Crop Planning: It is not a perfect world</li> <li>4. Record Keeping and profitability</li> </ol>	<p><b>Slide Deck (slides 24-29)</b></p> <p><b>Suggested Activities (15 minutes):</b></p> <ul style="list-style-type: none"> <li>• Crop planning exercise (Break off into groups depending on make-up of producer audience):</li> </ul> <p>VEGETABLE:</p> <ul style="list-style-type: none"> <li>— Calculate plot size (rows, row size) for scaling up production from 1000 sq ft to 1 acre based on anticipated yield</li> </ul> <p>GRAINS/ROW CROPS:</p> <ul style="list-style-type: none"> <li>— Assess acreage needed, seeding rate, yield, and profitability for grain/ pulse crops sold through an intermediary for school procurement</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Worksheets: Worksheet 4C: Planning Crop Production from a Bid Sheet Supplement- Online Excel based planning exercise</li> <li>• Video: Succession Planting and Season Extension for School Sales: Living Root Farm, Hardin, MT</li> <li>• Written Case Study: Season Extension for School Sales: Living Root Farm, Hardin, MT</li> </ul>

## MODULE 4: GROWING FOR SCHOOLS (CONTINUED)

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>D. Livestock Production Planning</b></p> <p>Duration: 30 minutes</p>	<p>In this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand school needs for meat, dairy, and egg production</li> <li>• Understand livestock planning based on demand, yield projections, and production goals</li> <li>• Assess schedules for sustained delivery and profitability</li> </ul>	<ol style="list-style-type: none"> <li>1. How do Livestock Products Fit on the Plate</li> <li>2. How do your products fit with school demands?</li> <li>3. Determine School needs</li> <li>4. Assess Current Production</li> <li>5. Plan Production Based on Demand</li> <li>6. Eggs (special considerations)</li> </ol>	<p><b>Slide Deck (slides 30-38)</b></p> <p><b>Suggested Activities</b> (15 minutes):</p> <ul style="list-style-type: none"> <li>• Livestock planning exercise (Break off into groups depending on make-up of producer audience):</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Worksheet 4D: Livestock Production and Planning—Capacity and Product Assessment</li> <li>• Podcast: Karla Buck with Bear Paw Meats</li> <li>• Written Case Study: Beef to School—Case Study of Bear Paw Meats</li> </ul>
<p><b>E. Navigating Food Safety Standards When Selling to Schools.</b></p> <p>Duration: 25 minutes</p>	<p>In this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Determine food safety requirements of area schools and work with them if the School Food Authority is not clear on the school's standards</li> <li>• Assess food safety next steps, based on the school's or other channel's food safety requirements</li> </ul>	<ol style="list-style-type: none"> <li>1. Myth busting: Food safety requirements in schools</li> <li>2. Finding Food Safety Requirements of School Food Authority</li> <li>3. Meat Processing and Food Safety</li> </ol>	<p><b>Slide Deck (slides 36-48)</b></p> <p><b>Suggested Activities</b> (10 minutes): <b>Break out by livestock or crops.</b></p> <ul style="list-style-type: none"> <li>• Discussion topic: communicating with school markets about food safety</li> <li>• If there is time, do a role-playing exercise where producers communicate with the SFA about their food safety practices</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Video: Mythbusting: Common Ground Farm—Working with schools to meet food safety expectations without GAP certification</li> <li>• Worksheet 4E: Communicating your Food Safety Protocols to School Food Authorities—Risk Assessment</li> <li>• Case Study: Common Ground Farm—Working with schools to meet food safety expectations without GAP certification</li> </ul>

## CONCLUSION: PLANNING FOR ACTION

Estimated Time: 45-60 minutes

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>A. Overview</b> Duration: 5 minutes</p>	<p>Following this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Use action planning as a tool to identify motivations and goals, next steps, resources, and contacts for successfully entering or expanding into school markets</li> </ul>	<p><b>1. Conclusion Overview and Goals</b></p> <p>a. Recap of Training Content</p>	<p><b>1. Slide Deck (slides 1-5)</b></p>
<p><b>B. Action Planning</b> Duration: 25-30 minutes</p>		<p><b>1. School Business Action Planning</b></p> <p>a. Finalizing Your School Business Action Plan</p> <p>b. Activity: School Business Action Plan Share-Out</p> <p>c. Activity: School Business Action Plan Conclusion: Tying it All Together</p> <p><b>2. Activity: Send a Post Card to Yourself</b></p>	<p><b>Slide Deck (slides 6-10)</b></p> <p><b>Suggested Activities:</b></p> <ul style="list-style-type: none"> <li>• School Business Action Planning Review and Share-Out</li> <li>• Send a Post Card to Yourself</li> <li>• Tying it All Together</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• School Business Action Planning Guide</li> <li>• School Business Action Plan: Tying it All Together</li> </ul>
<p><b>C. Training Evaluation and Follow-Up</b> Duration: 15 minutes</p>		<p><b>1. Training Evaluation and Follow-Up</b></p> <p>a. Post-training Survey</p>	<p><b>Slide Deck (slides 11-13)</b></p> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Post-training Survey</li> </ul>

# INTRODUCTION: THE POWER OF FARM TO SCHOOL

## About the Introduction

The introduction frames the *Bringing the Farm to School* training program for producers. Facilitators should aim to explain farm to school and why schools can be an important market for producers to pursue. The introduction will provide a brief overview of the overall program, including the program goals, objectives, and partners. This introduction should outline the flow of the training by providing a brief overview of the group exercises, worksheets, and business action planning. The introduction is a great opportunity for facilitators to set the stage for learning by showcasing the benefits of entering or expanding into school markets. Nothing does this better than a peer-to-peer approach. Consider highlighting benefits through hosting a producer panel to share experiences and answer initial questions about farm to school. By the end of the introduction, producers will have an idea of how their goals align with school sales.

INTRODUCTION: THE POWER OF FARM TO SCHOOL			
Estimated Time: 30-45 minutes			
Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>Introduction</b> Duration: 30-45 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>• Understand what farm to school is and how it can benefit them</li> <li>• Identify their motivations for selling to schools and how their farm goals align</li> <li>• Identify action planning as a tool for meeting their farm goals through farm to school sales</li> </ul>	<ol style="list-style-type: none"> <li><b>1. The Power of Farm to School: An Introduction to <i>Bringing the Farm to School</i> Producer Training Program</b></li> <li><b>2. Training Evaluation</b> <ol style="list-style-type: none"> <li>a. Overview</li> <li>b. Pre-survey</li> </ol> </li> <li><b>3. Icebreaker</b></li> <li><b>4. <i>Bringing the Farm to School</i> Producer Training Goal</b></li> <li><b>5. What is Farm to School?</b> <ol style="list-style-type: none"> <li>a. Three Core Elements</li> <li>b. Why Local Food in School Meals?</li> <li>c. How Schools Celebrate Local Food and Farmers</li> </ol> </li> <li><b>6. Benefits of Farm to School for Producers</b> <ol style="list-style-type: none"> <li>a. Producer Spotlights: Benefits of Selling to Schools for Your Operation</li> <li>b. Direct vs. Indirect Benefits</li> <li>c. Values Alignment</li> </ol> </li> <li><b>7. How Your Farm Goals Support Farm to School Sales</b> <ol style="list-style-type: none"> <li>a. Whole-Farm Planning and School Sales</li> <li>b. Business and Skills Assessment for Farm to School</li> </ol> </li> <li><b>8. Action Planning for Success: How Farm to School Can Help You Meet Your Farm Goals</b> <ol style="list-style-type: none"> <li>a. Action Planning: Setting Your Goals</li> </ol> </li> </ol>	<b>Slide Deck (slides 1- 22)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>• Producer Spotlight Discussion and Share-out</li> <li>• Action Planning: Setting Your Goals</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>• School Business Action Planning Guide</li> </ul>

## Introduction: Background Information for Facilitators

### Core Concepts

- Core elements of farm to school
- Benefits of farm to school for producers
- Basic goal-setting skills
- Action planning

### Digging Deeper into Core Concepts

- [Benefits of Farm to School](#), National Farm to School Network
- [Research Shows How Farm to School Works](#), United States Department of Agriculture Food and Nutrition Service
- [Whole Farm Plan Guide](#), Community Farms Program, The Land Conservancy of British Columbia
- [A Guide for Farm to School Community Action Planning](#), Vermont FEED

## Bringing the Farm to School Case Studies

- Farm to School Relationships
  - Podcast: Producer-Buyer Farm to School Perspectives (Fiery Ginger Farm and Natomas Unified School District, California)

## Key Terms

- Farm to school
- School markets
- Whole-farm goal setting
- School Business Action Plan

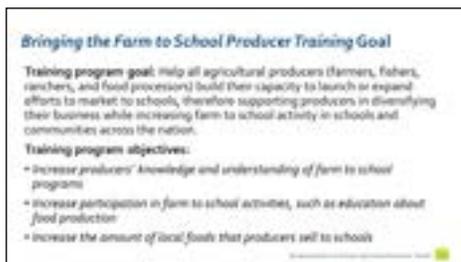
- Download slide deck [here](#)



## Introduction



### Slide 1: The Power of Farm to School: An Introduction to Bringing the Farm to School Training Program for Agricultural Producers (Title Slide)



### Slide 2: Bringing the Farm to School Training Goal

#### [Talking Points]

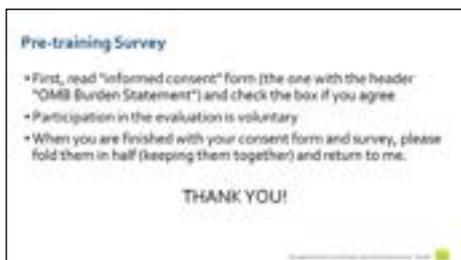
The overall goal of this training is to assist all agricultural producers (farmers, fishers, ranchers, and food processors) in building their capacity to launch or expand efforts to market to schools. Through increased school sales, producers can help grow farm to school activities in schools and communities across the nation.



### Slide 3: Training Evaluation Overview

#### [Talking Points]

- We hope you will help in the evaluation of this training. The evaluation will help improve future trainings and look at the impact of trainings.
- Before you start the training, you will take part in a short survey – about 10-15 minutes. After the training, we will ask you to fill out a very short survey – about five minutes long.
- Finally, we will follow-up with you via email in six to 12 months with a very short 5-minute survey.

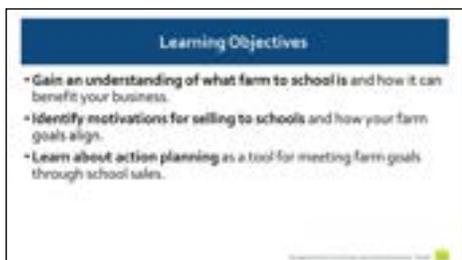


### Slide 4: Pre-training Survey

#### [Talking Points]

- In your survey packet, you have a survey stapled to an “informed consent” form (the one with the header “OMB Burden Statement”)
- You also have one copy of the informed consent for your own record; please keep that one.
- Read the informed consent before starting the survey and, if you agree, check the box for consent before you start the survey.

- Your participation in the evaluation is voluntary and you have the right to withdraw at any time. You do not have to provide a response for any survey question you don't want to.
- When you are finished with your consent form and survey, please fold them in half (keeping them together) and return to me.
- Thank you!



### Slide 5: Learning Objectives

#### [Talking Points]

- Producers will gain an understanding of what farm to school is and how it can benefit their business.
- Producers will identify motivations for selling to schools and how their farm goals align.
- Producers will be introduced to action planning as a tool for meeting farm goals through school sales.



### Slide 6: Icebreaker

#### [Talking Points]

- Take a moment to write down the following on the provided index card (2 minutes)
- Find two or three people you don't know and share your answers (5 minutes) or whole-group share out (5 minutes)

*Facilitator prompt: Provide all participants with an index card to write down their icebreaker answers. Depending on the size of the audience, not everyone will be able to share with the whole group. Request participants to respond to two of the prompts on the slide when sharing with the whole group. Consider collecting the index cards and take note of any questions or concerns that may arise. Make sure to follow up as best you can with answers, resources, or contacts as you go through the training.*



### Slide 7: What is Farm to School? (Section Header)



### Slide 8: What is Farm to School?

#### [Talking Points]

It is generally understood that farm to school is made up of three core elements:

- Procurement: local foods are purchased from a farm or food hub, promoted, and served in the cafeteria or as a snack or taste-test
- Education: students participate in education activities related to agriculture, food, health, or nutrition, which may include an in-class or school garden visit from a farmer or a classroom field trip to a producer's farm or place of business
- School Gardens: students engage in hands-on learning through gardening, providing additional opportunities for farmers to engage in mentorship, management of the garden, or on-site education.

Although people often think there is one standard for farm to school programs, the reality is much more variable. Farm to school is unique in every community and we intend to make sure that this training can provide clear answers about how farm to school can be a potential opportunity for you and your business.

Farm to school supports local and regional farmers while improving the health of children and communities. Although core elements can be used to leverage one another, this training will primarily focus on the element that is most meaningful to producers: selling your products to nearby school markets.



**Slide 9: Why Local Food in School Meals?**

*[Talking Points]*

So, why are school districts interested in getting locally produced foods into school meals?

- Supporting local farmers, businesses, and local economies
- Increasing school meal quality and overall school meal program participation
- Reducing food waste in schools
- Addressing the increasing demand for local foods in school meals from students, parents, and the rest of the school community
- Supporting school wellness policies and other administrator and school board priorities
- Aligning with community priorities and advocacy efforts to strengthen local food systems



**Slide 10: How Schools Celebrate Local Food and Farmers**

*[Talking Points]*

Here are some ways in which schools feature partnerships with local farms:

- Cafeteria promotion campaigns like tasting activities, posters, and point-of-sale signage
- Educational events like “farmer in the classroom”
- Local product / producer highlights in school menus and on school webpages
- On-site farmers markets / Community Supported Agriculture (CSA)
- Special events (barnraisers, local food/harvest community dinners)
- Communications: School newsletters, social media, school and community announcements
- Farm tours for students, often in partnership with classroom programs



**Slide 11: Benefits of Farm to School for Producers** *(Section Header)*



**Slide 12: Benefits of Farm to School for Producers, Part I**

*[Talking Points]*

Farm to school can have a significant financial impact for producers:

- According to the National Farm to School Network’s Benefits of Farm to School factsheet,
  - there is an average 5% increase in income from farm to school sales and this can lead to establishment of a long-term revenue stream for individual producers
  - there is an increase in market diversification and economic growth opportunities for producers.

Sales directly to schools, or via local purchasing programs offered to schools by regional aggregators, can offer farms a broader range of sizes of bulk-sales customers, compared to large-scale wholesale or processing bulk sales. School sales can also provide an opportunity for relationship-building that, once established, can require less effort than small retail sales, such as sales to restaurants. Farm to school is helping to shape the next generation of eaters and buyers. Increased exposure to fresh and local foods can shape student food preferences and impact family purchasing patterns, therefore increasing demand for local products and direct producer-to-consumer relationships in the community.

**Facilitator prompt:** Facilitator prompt: Incorporate farm to school trends relevant for the region or locale. See the [Farm to School Census](#) for data from relevant school districts. Encourage producers to share throughout the training why they are here and their ideas of the benefits of school sales for their farms.



### Slide 13: Benefits of Farm to School for Producers, Part II [Talking Points]

- May benefit profitability either of these ways:
  - Directly through increased sales: accessing new school markets and/or utilizing additional farm to school market channels, expanding product offerings, or increasing quantity and frequency
  - Indirectly through a diversified marketing strategy: marketing to students and families through school-based initiatives (school farm stands, farm visits, barn-raisers) or promotion (highlighting school relationships in your marketing materials for community farmers markets, local grocery stores, and restaurants). You can build off of farm to school successes to help grow your brand!
- May align with values and farm/business goals
  - Manage risk by accessing school markets, which can provide consistent and/or high-volume sales through diversified marketing channels.
  - Be a part of nourishing kids: your products help make school meals reflective of the community food culture and encourage kids to try new foods.
  - Help promote agricultural as a career pathway for youth. Farming can be an opportunity to make a living while upholding lifestyle choices and community values.
  - Be a key part of increasing access to fresh, local foods in your community.
  - Increase the visibility of small to medium-sized family farms, keep farmland in production, and keep farmers farming!



### Slides 14-16: Producer Spotlights: Benefits of Selling to Schools for Your Operation

**Facilitator prompt:** These spotlights are intended to provide an opportunity for participants to hear a producer's experience in launching or expanding farm to school sales. This may take the form of a small share-out and discussion with a farmer champion or by a former or current [USDA Farm to School grantee](#).

**Regionalization tip:** The quotes in slides 14-16 were shared by producers directly to project partners and are meant to be placeholders. Producers attending the training who are experienced with farm to school will be prompted to share what they have learned and what they would recommend for a diverse producer audience. Once you customize this section, you may remove or modify slides 14-16 and make space for sharing.



## Slide 17: How Your Farm Goals Support Farm to School Sales (Section Header)

*Facilitator prompt: Goal-setting helps producers assess how their lifestyles, farm landscape, and mission can frame their market selection. Producers will review their goals and how these relate to their school sales. This type of goal-setting is referred to as Whole-Farm Goal Setting, but does not need to be further covered for the purposes of this training.*



## Slide 18: Whole-Farm Planning and School Sales [Talking Points]

How many of you already have some sort of business plan in place?

- Don't worry if you don't have a plan in place! Today will help you craft a plan for school markets/sales that you can use as a model for broader, whole-farm planning.

A lot of variables go into goal-setting. The diagram on the screen shows how certain variables will shape your short- and long-term farm goals as they relate to school market sales. These variables include:

- Personal and farm characteristics: Do you feel confident with your production capabilities? How do you feel about risk? What are your lifestyle goals?
- Community variables: How far are you from your target market? Do you have access to community resources and capital? Are your transportation corridors difficult for accessing school markets?
- Production and marketing enhancements: Are you growing products that school buyers want? What investments in food safety or equipment, for example, need to happen for accessing school sales/markets?
- And finally, which market channels make sense based on all of these other factors.

This training will be addressing many of the variables in this diagram and will help you come up with a plan to follow through with the goals you identify. We will give you time for reflection through group exercises, worksheets, and action planning.



## Slide 19: School Business Assessment

*Facilitator prompt: You will be introducing producers to the School Business Action Planning Guide in Appendix A of their workbook:*

- School business assessment
- Benefits of farm to school that interest you
- School Business Action Plan

### [Talking Points]

This farm to school business assessment will help you identify areas that will be particularly important to think about and plan for as you move through the training. The assessment can be used to identify gaps in your skills and resources that need to be addressed before starting school sales. In this example, you can see that this producer feels confident their abilities to grow for schools and what their goals are but needs some support related to better understanding Child Nutrition Programs and how to actually sell to schools.

Take 5-8 minutes to fill out the school business assessment, in your Producer Workbook. Each category is arranged by content areas covered in this training. The scoring is on a scale of 1-5 with 1 being little to no skills or resources, and 5 indicating strong skills and ample resources.



## Slide 20: Action Planning for Success: How Farm to School Can Help You Meet Your Farm Goals (Section Header)

### [Talking Points]

You will leave this training with a School Business Action Plan for accessing school markets. This School Business Action Plan will provide you with tangible next steps for selling to schools that reflect farm goal-based decision making. The School Business Action Planning Guide is located in Appendix A of your Producer Workbook. This guide will be revisited and filled in at the end of each module.

*Facilitator prompt: We encourage facilitators to build in time at the conclusion of each module to have producers fill in their School Business Action Plan (Producer Workbook, Appendix A). Trainers will be expected to provide School Business Action Plan samples to demonstrate variability among producers related to products, scales, and farm to school experience.*



## Slide 21: Action Planning for Success: Setting Your Goals

### [Talking Points]

- We'll be using the School Business Action Planning Guide in your Producer Workbook throughout the training to ensure you have an action plan with at least two to three "next steps" to pursue once you leave this training.
- But first, what is action planning?
  - An action plan is a tool used to support you in achieving the short-term and long-term goals of selling to schools.
- Consider these things when developing a school business action plan for farm to school:
  - Motivations to participate in or expand school markets (your values/goals)
  - Short-term and long-term goals for farm to school sales, and the bottom line you need to achieve to cover expenses and earn a profit
  - The value you can provide schools
  - Action steps for the next six to 12 months following this training
  - Resources, contacts, and information you need to implement your plan
- What are SMART goals?
  - SMART Goals = Specific, Measurable, Achievable, Realistic, and Timebound
  - As you work through the School Business Action Planning Guide, make sure your "Next Steps" are SMART!
- Throughout this training program, you will be completing a School Business Action Plan that you can take when you leave the training. Each module will address barriers, and we will support you in developing a plan that identifies the action steps needed to overcome them.
- At the end of this training, you will have the opportunity to revise and refine your plan, once you have the whole picture of farm to school sales.
- To start, let's take **10 minutes** for everyone to fill out the "Benefits of farm to school that interest you" section of the action planning guide in your Producer Workbook.
- Remember to look back at your School Business Assessment web to help answer questions.
- Keep these benefits and goals in mind as we continue through the training program today. As I mentioned earlier, we'll be returning to this guide at the end of each module to "check in" about learning objectives and next steps.



## Slide 22: Conclusion Slide

*Facilitator prompt: Please fill out the last slide with the appropriate contact information. Depending on your overall training schedule, this may be a good time to take a 10-15 minute break.*

# MODULE 1: GETTING TO KNOW SCHOOL MARKETS

## About Module 1

This module is intended to provide producers with a high-level overview of USDA Child Nutrition Programs (CNPs) as a market opportunity. It also helps producers understand the regulations and characteristics of CNPs that influence their purchasing practices. Following this session, producers will have a basic understanding of the diversity of ways that schools procure, prepare, and serve foods.

### MODULE 1: GETTING TO KNOW SCHOOL MARKETS

Estimated Time: 1 hour

Optional Content Estimated Time: 20 minutes

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>A. Child Nutrition Programs</b> Duration: 30 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>Understand the diversity of product needs for Child Nutrition Programs</li> <li>Understand how Child Nutrition Programs process, prepare, and serve local foods</li> <li>Determine what types of local products schools want to purchase</li> </ul>	<ol style="list-style-type: none"> <li><b>Introduction</b></li> <li><b>A Brief Overview of Child Nutrition Programs</b> <ol style="list-style-type: none"> <li>Child Nutrition Programs</li> <li>School Meal Programs by the Numbers</li> </ol> </li> <li><b>What Influences School Meal Program Purchasing?</b> <ol style="list-style-type: none"> <li>A Look at Child Nutrition Program Meals</li> <li>Meal Components and The Cost of a School Meal</li> </ol> </li> <li><b>The Diversity of School Meal Programs</b> <ol style="list-style-type: none"> <li>Product Needs: One Size Does Not Fit All</li> <li>School Meal Program Kitchens</li> <li>School Meal Program Models</li> </ol> </li> </ol>	<b>Slide Deck (slides 1- 23)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>School Meal Memories (Estimated Time: 5 minutes)</li> <li>What About My Product? (Estimated Time: 3 minutes)</li> <li>Getting to Know Your Local School Market (Estimated Time: 10-15 minutes)</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>Farm to School in Action Video                             <ul style="list-style-type: none"> <li><a href="#">Regenerating Paradise, Hawaii Center for Food Safety</a> (Dash and Erika Kuhr, HIP Agriculture)</li> <li><a href="#">Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems</a> (Mary Brower, Blue Stem Farm)</li> <li><a href="#">Farm to School in the Garden State</a> (Northeast Organic Farming Association of New Jersey)</li> </ul> </li> <li>Video Tour of a Child Nutrition Program Kitchen                             <ul style="list-style-type: none"> <li><a href="#">Collards in the Cafeteria</a> (Gaston County, North Carolina)</li> </ul> </li> <li>Worksheet 1A: Getting to Know Your Local School Market</li> </ul>
<b>B. Local Food Sourcing and Procurement In School Meal Programs</b> Duration: 30 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>Understand the basics of how school districts source and procure local foods for school meal programs</li> </ul>	<ol style="list-style-type: none"> <li><b>The Farm to School Supply Chain</b> <ol style="list-style-type: none"> <li>What Is "Local"?</li> <li>How Schools Source and Incorporate Local Foods</li> <li>School Food Service Cycles</li> </ol> </li> <li><b>School Food Procurement 101</b> <ol style="list-style-type: none"> <li>Procurement Standards</li> <li>Procurement Methods</li> <li>Procurement Process</li> </ol> </li> <li><b>Conclusion and Next Steps for Module 1</b> <ol style="list-style-type: none"> <li>Applied Activity — School Food 101 Game</li> <li>Questions for Reflection</li> <li>Action Planning</li> </ol> </li> </ol>	<b>Slide Deck (slides 24-44)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>Finding the Right School Meal Program for You: Case Study Review and Discussion (Estimated Time: 15 minutes)</li> <li>School Food 101 Game (Estimated Time: 5 minutes)</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>Worksheet 1B: Finding the Right School Meal Program for You</li> <li>Farm to Child Nutrition Program Case Studies                             <ul style="list-style-type: none"> <li><a href="#">Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity</a> (Joseph Martinez, Arizona Microgreens)</li> <li><a href="#">Building Sustainable Relationships with School Nutrition Programs</a> (Rae Rusnak, L&amp;R Poultry and Produce)</li> <li><a href="#">The Right Product and The Right Partnership</a> (Kenneth Sweat, Sweat's Produce)</li> </ul> </li> </ul>
<b>OPTIONAL CONTENT</b> <b>C. Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs (CACFP and SFSP)</b> Duration: 20 minutes		<ol style="list-style-type: none"> <li><b>The Child and Adult Care Food Program and the Summer Food Service Program</b> <ol style="list-style-type: none"> <li>Child and Adult Care Food Program (CACFP)</li> <li>Summer Food Service Program (SFSP)</li> </ol> </li> </ol>	<b>Slide Deck (slides 1-11)</b>

## Module 1: Background Information for Facilitators

### Core Concepts

- Diversity and requirements related to USDA Child Nutrition Programs
- Food procurement in USDA Child Nutrition Programs

### Digging Deeper into Core Concepts

- [United States Department of Agriculture Child Nutrition Programs](#), USDA Food and Nutrition Service
- [Procuring Local Foods for Child Nutrition Programs: Training Program](#), Institute of Child Nutrition

## Bringing the Farm to School Case Studies

- Farm to School in Action
  - Video: [Regenerating Paradise, Hawaii Center for Food Safety](#) (Dash and Erika Kuhr, HIP Agriculture)
  - Video: [Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems](#) (Mary Brower, Blue Stem Farm)
  - Video: [Farm to School in the Garden State](#) (Northeast Organic Farming Association of New Jersey)
- Inside a School Meal Program Kitchen
  - Video: [Collards in the Cafeteria](#) (Gaston County, North Carolina)
- Selling to School Meal Programs
  - Written Case Study and Podcast: [Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity](#) (Joseph Martinez, Arizona Microgreens)
  - Written Case Study and Podcast: [Building Sustainable Relationships with School Nutrition Programs](#) (Rae Rusnak, L&R Poultry and Produce)
  - Written Case Study: [The Right Product and the Right Partnership](#) (Kenneth Sweat, Sweat’s Produce)

## Key Terms

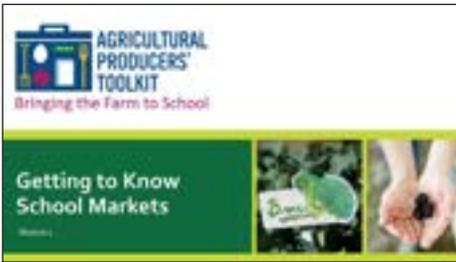
- Child Nutrition Programs (CNPs)
- School Food Authority (SFA)
- Child Nutrition Program Director
- School Nutrition Director
- Child Nutrition Program Operators
- State Administering Agency
- Food Service Management Company (FSMC)
- Food supply chain
- Procurement
- Federal procurement regulations
- Vendor
- Solicitation
- Contract
- Specification



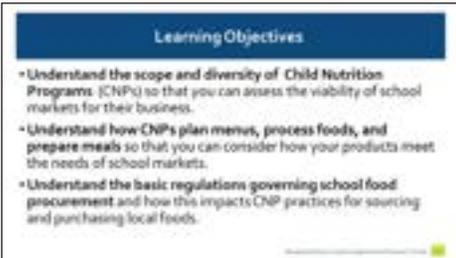
### *Facilitator tips:*

- *As a reminder, Bringing the Farm to School modules and module content can be customized and reorganized based on the interests and needs of your audience. You may choose to present specific parts of this module most relevant to the producers in your state/locale.*
- *While Module 1 provides important background information that sets the stage for future modules, producers may bring up questions about school sales that will be addressed in later modules. Consider creating a “Parking Lot” to ensure questions are not lost, and you can follow up and address them at the appropriate time.*

# Module 1: Introduction



Slide 1: Module 1: Getting to Know School Markets (Title Slide)



Slide 2: Learning Objectives

[Talking Points]

This module is intended to provide you with a high-level overview of USDA Child Nutrition Programs (CNPs) as a market opportunity and to help you understand the regulations and characteristics of CNPs that influence their purchasing practices. Following this session, you will have a basic understanding of the diversity of ways that schools procure, prepare, and serve foods. The information in this module provides an important foundation for the information you will learn in Modules 2-4.



Slide 3: Applied Activity – Let's Play Jeopardy

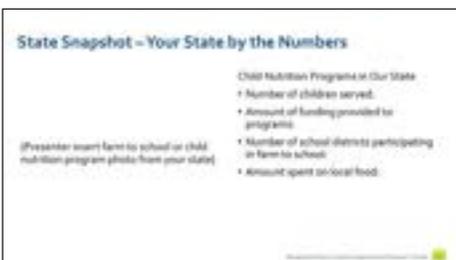
Facilitator prompt:

- This is an optional activity to get producers familiar with the terminology in this module. Use the key terms from this module, the glossary, and instructions from [How to Create a PowerPoint Jeopardy Quiz](#) to create the activity. Participants will guess the proper term by saying "what is..."
- Plan for 10-15 minutes of this activity.

## Section A: Child Nutrition Programs



Slide 4: Child Nutrition Programs (Section Header)



Slide 5: State Snapshot – Your State's Child Nutrition Programs by the Numbers

*Regionalization tip:* Use this opening slide to highlight Child Nutrition Programs as a market opportunity in your state, including total reach and total dollars spent on local food. You can find your state-specific information at these sites:

- [USDA FNS Child Nutrition Program Tables](#)
- [USDA Farm to School Census](#)

[Talking Points]

- Child Nutrition Programs reach a significant number of children in our state and spend a lot of money on food for these meals.
- This represents a significant market opportunity for you as a producer.



## Slide 6: Farm to School in Action

### [Talking Points]

- Let's take a closer look at what Child Nutrition Programs, and specifically local foods in these child nutrition programs, look like today.
- As you can see in this video and what you've learned so far in the introduction, Child Nutrition Programs, and the school meals served through these programs, have changed a lot over the years.

**Facilitator prompt:** Select a Farm to School in Action video that aligns with your region or producer audience. These are three videos to choose from:

- [Regenerating Paradise, Hawaii Center for Food Safety](#) (Dash and Erika Kuhr, HIP Agriculture)
- [Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems](#) (Mary Brower, Blue Stem Farm)
- [Farm to School in the Garden State](#) (Northeast Organic Farming Association of New Jersey)



## Slide 7: Applied Activity: School Meal Memories

**Activity objective:** Participants will recognize the evolution of meals in Child Nutrition Programs and how appetizing today's school meals can be.

### [Talking Points]

- What do you think of when you think of school meals? Did the school meals you grew up with look like the meals in the video?
- Pair and Share:
  - Turn to someone next to you and introduce yourself. Share with them a school meal memory or what you think of when it comes to school meals. Is that different from or the same as what you saw in the video?
  - Provide 1-2 minutes for pair and share.
- Group share back: Would anyone like to share what first came to their mind?
  - Have 2-3 people share their memory.
  - Facilitator summarizes positive themes

**Facilitator prompt:** Plan about 5 minutes for this activity. If time is limited, facilitate large-group feedback with key questions:

- What do you think of when you think of school meals?
- Did the school meals you grew up with look like the meals in the video?



## Slide 8: A Brief Overview of Child Nutrition Programs (CNPs)

### [Talking Points]

- Now that we have seen and heard about what farm to school looks like in action, we are going to get to know our farm to school markets by exploring Child Nutrition Programs (and the school meals served through these programs).
- Child Nutrition Programs can drive demand for local products with their large-volume purchasing and provide a steady market opportunity for local producers.
- Following this section, you will understand the diversity of USDA's Child Nutrition Programs and why they are a viable market opportunity for you.



## Slide 9: School Meals — More Appetizing Than You Remember

### [Talking Points]

- School meals have changed a lot over the years (as you noted in our previous activity). New policies have been enacted and implemented in the last 10 years, requiring more— and an increased variety of—fruits and vegetables, more whole grains, lean protein, and low-fat dairy.
  - School meals aim to ensure access to safe and healthy foods. In many programs, there is a focus on tasty, healthy food that children really want to eat and that fuels them for learning.
  - The National School Lunch Program (school meals) originated not just as a way to provide food for children, but also to create a market for producers with extra product. Many programs and purchasing practices still aim to support and benefit agricultural producers.
- There are other meals or “nutrition programs” outside of just school lunch, which we will talk about later in this section (such as school breakfast or snack programs). Together, these diverse programs are known as Child Nutrition Programs (CNPs). The United States Department of Agriculture funds and administers these Child Nutrition Programs.
- Child Nutrition Program operators, the directors and decision makers who operate Child Nutrition Programs, are focused on quality of foods and connecting kids to healthy, appetizing food.
  - Many of them are interested and passionate about local, high-quality products coming from agricultural producers like you.
  - Farm to school is a USDA-recognized strategy to help enhance meal quality.

*Facilitator prompt: Link this dialogue back to what you heard in the icebreaker activity. What are the preconceived notions about school food? Aim to address these ideas as you introduce Child Nutrition Programs. Reinforce the final point that farm to school is a recognized strategy for increasing the quality of meals, in addition to the many benefits listed in the introduction.*



## Slide 10: Child Nutrition Programs – School Meal Programs

### [Talking Points]

*Regionalization tip: Be sure to add any state or regionally specific programs.*

Child Nutrition Programs go beyond K-12 school lunches. The many different Child Nutrition Programs have a variety of needs when it comes to food purchasing, which can mean different opportunities for you. They include the following:

- National School Lunch Program (NSLP) — Provides lunch for students at K-12 schools (including public and nonprofit private schools and residential child-care institutions).
  - There is a wide variety of sizes of programs and ways of purchasing for the National School Lunch Program. In a small community, these Child Nutrition Programs may serve only a few students, while in a large community Child Nutrition Programs may feed tens of thousands of children each day.
- Fresh Fruit and Vegetable Program (FFVP) — Provides additional fresh fruit and vegetable snacks throughout the school day in eligible elementary schools.
- School Breakfast Program (SBP) — Usually operates in conjunction with NSLP, but ensures students have access to breakfast.

We are calling these programs our “school meal programs” because they are most often administered through school districts.

*Facilitator prompt: Producers can find a chart with this information in their copy of the [Producer Workbook](#).*



## Slide 11: Child Nutrition Programs – Additional Child Nutrition Programs

### [Talking Points]

Additional Child Nutrition Programs include:

- Child and Adult Care Food Program/At-Risk After School (CACFP) — Provides meals and snacks for children in early care and education (which includes preschools, child-care centers, family child-care homes) and after-school programs. The Child and Adult Care Food Program also serves adult day care; however, our focus today is Child Nutrition Programs.
  - Child and Adult Care Food Program is sometimes smaller than National School Lunch Program.
  - It also often functions throughout the traditional school year and the summer, providing year-round market opportunity.
- Summer Food Service Program (SFSP) — Ensures children have access to healthy meals over summer break when school is not in session.
  - Many Summer Food Service Programs take place at a school or in community locations like parks, libraries, or even farmers markets.

For the purposes of this training, we will be focusing on the programs most often administered through school districts, including the National School Lunch Program, the School Breakfast Program, and the Fresh Fruit and Vegetable Program. Collectively, we'll call these “**school meal programs.**” More information on the Child and Adult Care Food Program and Summer Food Service Program can be found in the Module 1: Optional Content- Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs (CACFP and SFSP).

*Facilitator prompt: If you are planning to present Module 1: Optional Content, let producers know that they will learn more about these additional programs later. If you are not planning to present the optional content, refer producers to the PowerPoint slide deck ([available here](#)) to learn more.*



## Slide 12: School Meal Programs by the Numbers

*Regionalization tip: Include state/region-level numbers to show the local market and opportunity. Note any additional reimbursement programs in your region, especially local reimbursement incentives.*

### [Talking Points]

- Altogether, these school meal programs serve millions of children and purchase billions of dollars of food annually. This is a look at two of these:
  - National School Lunch Program (2019)
    - Nearly 100,000 schools participate
    - 28.9 million students served each day
    - \$13.83 billion in federal spending each year
  - Fresh Fruit and Vegetable Program (2020)
    - \$193.5 million in federal spending
- According to the 2019 USDA Farm to School Census, child nutrition programs spent **1.26 billion dollars** on local food in the 2018-19 school year.
- It is important to keep in mind that this may be only part of the picture. Some states provide supplemental funding. Some states even provide additional reimbursement for local foods served.



### Slide 13: Key Players — Federal to Local

#### [Talking Points]

- You will notice that today you are at a training developed by the United States Department of Agriculture, a federal agency, and we are talking about federal dollars spent. Our goal is for you to be able to connect to your local school meal programs. Let’s look at how these key players are connected.
  - Funding for school meal programs (like those we just talked about) comes through the federal government: specifically, the United States Department of Agriculture Food and Nutrition Service (USDA FNS). USDA FNS determines meal patterns and nutrition requirements and meal reimbursement rates, which will be discussed later in this section.
  - Federal funds are paid to state agencies, which are responsible for the administration and oversight of the Child Nutrition Programs. The state agency provides program support and manages reimbursement for meals served to the School Food Authority (SFA). State agencies that administer school meal programs vary, and may include departments of education, health, or sometimes agriculture.
  - The School Food Authority (SFA) is the administering unit for the operation of school meal programs.
    - The School Food Authority is most often a school district. You may hear “School Food Authority” and “school district” used interchangeably.
    - They submit an application to the state administering agency to get approval to run a USDA Child Nutrition Program (school meal program) in their community.
    - SFAs (or school districts) receive federal reimbursements for meals served and are responsible for running the child nutrition program (including purchasing) and ensuring that meals served are being counted correctly and that eligibility criteria are met.
- We are focusing today on your connection at the local level. These other key players may be important to consider, and we’ll see how they influence the local level in later sections.

#### Facilitator prompt:

- *Understanding the different players engaged in school meal programs helps producers understand the different levels of decision-making and influence that go into school meal program purchasing.*
- *Refer producers to more information about these new terms in the [Producer Workbook](#).*



### Slide 14: What Influences School Meal Program Purchasing?

#### [Talking Points]

- Now that we know a little bit about the diversity of school meal programs you can sell to, start to consider what influences the purchases those programs make. This will allow you to start to think about what you produce, or could produce, that meets the needs of different programs.
- We will discuss two specific requirements and regulations:
  - Meal pattern and nutrition requirements—these determine the types of food that programs serve; and
  - Meal costs—what schools spend on food, labor, etc., and what they are reimbursed.



## Slide 15: A Look at School Meal Program Meals

### [Talking Points]

- Here you see photos of a typical meal from different school meal programs.
  - In the National School Lunch Program, you see the five food components of milk, grains, protein (meat or meat alternative), fruit, and vegetable.
  - In the School Breakfast Program, you see three of the five food components offered: milk, grains or protein, and fruit or vegetable.
  - The Fresh Fruit and Vegetable Program is focused on providing eligible elementary school students with an extra serving of fresh fruit and vegetables outside of mealtimes.
- There are slight differences across the programs as far as the food components they serve, but we are still working with the same five required food components: milk, grains, protein (meat or meat alternative), fruit, and vegetable.
- Local foods can span the whole tray. Any or all of the meal components could be local.

*Facilitator prompt: Reiterate here that school meal programs require a variety of types of foods, and local foods can be included as any of the meal components.*



## Slide 16: School Meal Program Meal Components

### [Talking Points]

- For each of these components, we have some additional nutritional requirements.
- You certainly don't need to remember all of these, but you can start to think about what you do—or could—produce, that meets these requirements:
  - Milk: fat-free or low fat (1%)
  - Grains: Half of grain products served must be “whole grain-rich,” meaning greater than 50% whole grain. All other grain products must be enriched.
    - If you are selling a grain product, it is important to communicate that it is greater than 50% whole grain, so programs know it fits into their requirements.
  - Fruit: Limited juice (offer whole fruits instead)
  - Vegetables: Weekly vegetable sub-group requirements and example foods include:
    - Dark Green: bok choy, spinach, kale, chard, collard greens, broccoli, dark green leafy lettuce
    - Red/orange: winter squash, carrots, red peppers, sweet potatoes, tomatoes
    - Beans and peas: black beans, black-eyed peas, lentils, pinto beans
    - Starchy: cassava, corn, green peas, plantains, potatoes
    - Other: celery, zucchini, cauliflower, green beans, cucumbers
  - Meat/Meat alternatives: meat, poultry, fish, cheese, yogurt, dry beans and peas, whole eggs, alternate protein products, soy yogurt, tofu, peanut butter or other nut or seed butters, and nuts and seeds
- Key leverage points to remember when selling to schools:
  - Color and variety—program operators look for a diversity of vegetables to meet meal pattern requirements.

- Overcoming seasonal barriers—cold-weather crops and storage crops can help meet the vegetable sub-group meal pattern requirements (greens, winter squash, sweet potatoes). Meat, dairy items, grains, and more may be available for sale year-round.
- Other nutrition standards—sodium, saturated fat, trans fat, and calories—whole, less-processed foods, like those that you are offering, can help meet nutrition standards

**Facilitator prompt:**

- Producers can find these meal components and key leverage points listed for their reference in the [Producer Workbook](#).
- This slide is an important link to future content (Module 3) and will prompt producers to consider how their current production aligns with school meal program product needs.



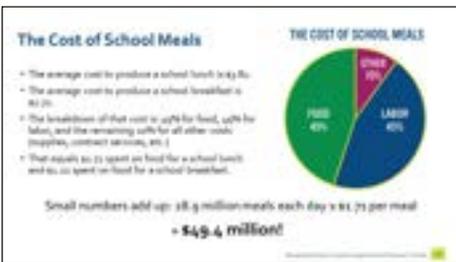
**Slide 17: Applied Activity: What About My Products?**

**Activity objective:** Identify products you are already producing that would be of interest to school meal programs.

**Facilitator prompt:** Plan about 3 minutes for this activity.

Take a moment to write down what products you are already producing that would help a school meet these meal pattern requirements and nutrition standards.

- Pair and share if time allows.



**Slide 18: The Cost of a School Meal**

**[Talking Points]**

- We know that one of the perceived barriers to selling to school meal programs is finding a price point that programs can afford and ensuring that this price point benefits you as a producer.
- So, let’s look a little bit more closely at what school meal programs are working with.
- According to the School Nutrition and Meal Costs Study released in 2019:
  - The average cost to produce a school lunch is \$3.81.
  - The average cost to produce a school breakfast is \$2.72.
  - The breakdown of that cost: 45% for food, 45% for labor, and the remaining 10% for all other costs (supplies, contract services, etc.)
  - That equals \$1.71 spent on food for a school lunch and \$1.22 spent on food for a school breakfast.
- Child Nutrition Program operators (school nutrition professionals who manage and run Child Nutrition Programs) and school nutrition directors (the individuals responsible for planning, administering, implementing, monitoring, and evaluating school meal programs) have flexibility in how they spend their food dollars, so they may go over this budget for some items, or a special meal, and balance that out by using more USDA Foods (discussed further in Module 2) or less-expensive foods in other meals.
- We know these are small numbers, so school meal programs have to be creative with how they purchase foods. Yet, many school meal programs are serving delicious meals full of local foods on this budget, and those

numbers can add up in schools and districts with many students. It does take time to build relationships with these operators and to find the price point that benefits both of you. Communication and relationships are key.

- 28.9 million meals each day x \$1.71 per meal = \$49.4 million! Those small numbers can add up.

*Facilitator prompt: Although the amount of money spent on an individual meal is relatively small, the volume of meals served can help those numbers add up. Share the total dollars spent on food to help producers understand the budget school meal programs are working with, but reiterate the flexibility programs have in spending and how those meal dollars can add up. Reference back to the amount of money spent in your state (in slide 1).*



## Slide 19: Program Reimbursement Rates

*Regionalization tip: Be sure to add any state-funded supplementary reimbursement programs, especially for local procurement incentive programs. You can find this information through the [state agency](#) that administers school meal programs in your state.*

### [Talking Points]

- School Food Authorities/school districts get reimbursed for serving a complete (a.k.a. “reimbursable”) meal that includes all the components and meets the nutrition standards.
  - Reimbursement is tied to participation, so the more students participate in the meal program, the higher the reimbursement. Participation rates are important to schools, so they are always looking for ways to increase participation. Farm to school is a great strategy for this.
- These reimbursements change slightly from year to year and are always published in the *Federal Register*.
- The level of reimbursement depends on student eligibility for free and reduced-price meals. This eligibility is dependent on family income.
- The 2021-22 Reimbursement Rates are as follows:
  - National School Lunch Program:
    - Ranges from \$0.35 for “paid” meals (meals served to children not eligible for free or reduced-price meals) to \$3.66 for meals served to students who are eligible for free meals.
  - School Breakfast Program:
    - From \$0.33 cents for “paid” meals in non-severe-need schools (low rates of students eligible for free and reduced-rate meals) to \$2.35 for meals served to students who qualify for free meals in severe-need (high rates of students eligible for free and reduced-rate meals) schools.
  - Note: there is a difference for Alaska, Hawaii, and the U.S. Territories
- Again, some states may be providing supplemental funding for snacks and meals. Some states even provide additional reimbursement for local foods served.

*Facilitator prompt: Federal reimbursement amounts change yearly. Please update reimbursement rates as needed to ensure information is accurate and up to date. Access current reimbursement rates here: [National School Lunch and School Breakfast Program Rates of Reimbursement](#). This information provides context for future pricing discussions in Modules 3 and 4. Understanding the cost and financial balance that school meal programs are working with will help producers build relationships that can result in mutually beneficial partnerships.*



## Slide 20: The Diversity of School Meal Programs (Section Header)

### [Talking Points]

Within each school meal program, individual School Food Authorities/school districts are very different in size, scale, and capacity to prepare foods.

- This creates great opportunity for you as a producer to connect with the school meal program, size and scale of program, and market pathway that can work best for you.

Product Need: One Size Does Not Fit All

CNF Setting	Serving Size	Number of Meals	Pounds Needed
Large K-12 District - Plated Lunch	¾ Cup	350,000	108,150
Medium K-12 District - Plated Lunch	¾ Cup	5,000	1,545
Small K-12 District - Fresh Fruit and Vegetable Snack	½ Cup	500	102
Medium K-12 District - Salad Bar	Variable	Variable	50

## Slide 21: Product Needs: One Size Does Not Fit All

### [Talking Points]

- The different sizes of school meal programs determine the amount of product they require.
- Here we see a comparison of the amount of broccoli needed for:
  - A very large K-12 school district that is serving ¾-cup servings (the minimum vegetable serving per day for K-8 grades) in 350,000 lunches (very large school district, e.g., Los Angeles Unified School District) = 108,150 pounds of broccoli;
  - A medium K-12 school district that is serving ¾-cup servings (the minimum vegetable serving per day for K-8 grades) in 5,000 lunches = 1,545 pounds of broccoli;
  - A small K-12 school district serving ½-cup of broccoli for fresh fruit and vegetable program snack for 500 children = 102 pounds of broccoli
  - A medium K-12 school district serving broccoli as one of several vegetable options on their salad bar = 50 pounds of broccoli
- You can see these influences on volume requirements:
  - Type of school meal program (e.g., National School Lunch Program vs. Fresh Fruit and Vegetable Program)
  - Age of students served
  - Mode of serving (plated meals versus salad bar)
- When exploring potential school meal program markets, it is important to know these factors and what volume the program needs.

#### Facilitator prompt:

- Producers can find the sample volume requirement chart in the [Producer Workbook](#).
- This slide is an important link to future content (Module 3) and will prompt producers to consider how their current production aligns with school meal program product volume needs.



## Slide 22: School Meal Program Kitchens

### [Talking Points]

- Just like a farm, “If you’ve seen one school meal program kitchen, you’ve seen one school meal program kitchen.”
- The equipment, space, storage, and staffing vary greatly across school meal programs.
- You can see in these photos the range of kitchens, from well-equipped, industrial kitchens that have capacity for scratch cooking to what we call a “heat-and-serve” kitchen where pre-prepared food is reheated for service.
- Some school meal programs do not have the equipment or staff capacity to process fresh, whole foods themselves. These programs may need

minimally processed product (e.g., cleaned, peeled, chopped) or fully prepared products to use in their programs.

*Facilitator prompt: The type of kitchen a school meal program has heavily influences the type of product they will be able to purchase (unprocessed, minimally processed, or fully prepared). This information sets the stage for Module 3, where producers will identify key questions to ask Child Nutrition Program operators or school nutrition directors regarding their product needs.*



### Slide 23: Video Tour of a School Meal Program Kitchen

#### [Talking Points]

- Let's take a brief tour of a school kitchen to see for ourselves.
  - Play video

#### Video Option:

- [Collards in the Cafeteria](#) (Gaston County, North Carolina)



### Slide 24: School Meal Program Models

#### [Talking Points]

- As previously discussed, based on their size, scale, equipment, and infrastructure, school meal programs have different production models. These models will influence who you need to connect with to get your product into the system:
  - On-site food preparation— Meals are prepared on-site at the school. This model may be operated by the school district or contracted to a **food service management company** by the School Food Authority to operate any aspect of the school meal program.
  - Central kitchen model—one large central kitchen (or satellite production kitchen) prepares food and delivers the prepared meals to “satellite” locations. This model may be operated by a School Food Authority or contracted to a food service management company.
  - Vended meal sponsors—a third-party meal supplier is contracted by the School Food Authority to prepare and deliver meals.



### Slide 25: Applied Activity: Getting to Know Your Local School Market

*Activity Objective: Identify current local food purchasing practices in districts in your region and state. Use Worksheet 1A: Getting to Know Your Local School Market in the [Producer Workbook](#).*

*Facilitator prompt: Plan about 10-15 minutes for this activity.*

#### [Talking Points]

- Now we will take a closer look to see what schools in your area are purchasing locally.
- Use your phone to access <https://farmtoschoolcensus.fns.usda.gov>.
  - Let's start by looking at information about a school district near you. In the survey school districts are called “school food authorities.” Enter the name of a school district/school food authority near you or your zip code to find one near by.
  - Explore the school district/school food authority and find responses to the questions on the worksheet in the Producer Workbook. Questions to explore include:
    - What size is your local school district?
    - From where does the SFA purchase local foods?

- What are the top five local items purchased by your local SFA?
  - For the 2018-2019 school year, about how much of your SFA's total food purchases were spent on LOCAL foods INCLUDING fluid milk?
  - How many schools in the district have salad bars that served local foods?
  - What percent of food is from scratch?
- You can also learn more about local food purchasing across your state by downloading the “2019 Farm to School Census State Summary.” See if you can find responses to these questions:
- What percent of schools in the state serve local food (Tab 14)?
  - What are the most frequently purchased types of foods (Tab 25)?
  - What percent of its budget is the average district spending on local (Tab 27)?

*Facilitator prompt: Alternate activity if participant access to the Internet is limited: Trainer demonstrates how to navigate to USDA Farm to School Census data and shows state and local district information.*

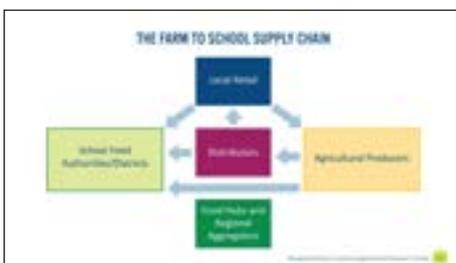
## Section B: Local Food Sourcing And Procurement In School Meal Programs



### Slide 26: Section B: Local Food Sourcing and Procurement in School Meal Programs (Section Header)

#### [Talking Points]

- In this section, producers will learn the basic concepts of how School Food Authorities procure foods (including local foods). This section will set the stage for a deeper dive into market pathways in Module 2.
- For the purposes of this section, we will be using the terms “school district” and “School Food Authority” (SFA) interchangeably. As a reminder, School Food Authority (usually a school district) is the administering unit for the operation of a school meal program.



### Slide 27: The Farm to School Supply Chain

#### [Talking Points]

- Farm to school programs not only seek to connect the producer with school markets through sales of local products, but also with the student as the end consumer. Regardless of the supply-chain model, local procurement initiatives benefit a variety of supply-chain partners, including students, schools, intermediaries, and producers. Here are some examples of benefits:
  - School Food Authorities/districts: reduction in food waste from product spoilage, alignment with nutrition standards and procurement regulations, and improvements in meal participation rates.
  - Local Retail Outlets: School Food Authorities/districts can easily access small amounts of local products through local food co-operatives and grocery stores; this supports local businesses and economies.
  - Food Hubs and Regional Aggregators: school purchasing trends show increased interest in product development and increased demand for aggregation and distribution services from food hubs and regional aggregators.
  - Distributors: School Food Authorities/districts drive demand and supply of local product by requesting and sourcing local products; expanded product lines create potential to serve new markets (such as restaurants, hospitals, colleges, and other institutions.)

- Agricultural Producers: Schools provide a steady and growing market for diverse local agricultural products. Product demand often exceeds current available supply—this supports local producers seeking to invest in scaling up operations.



## Slide 28: What Is “Local”?

### [Talking Points]

- School Food Authorities and school districts define for themselves what “local” means. The definition of local is flexible. SFAs may determine the definition based on local and regional food availability and program goals.
  - This may be defined by the state for a particular program if there is a state incentive program (e.g., increased reimbursement for purchases of local food).

*Regionalization tip: Add regional/state information here if applicable.*

- A definition of local can also vary based on product and time of year, or it could even be a “tiered” definition.
- The USDA Farm to School Census offers these possible definitions for local:
  - Produced within a 20-mile radius
  - Produced within a 50-mile radius
  - Produced within a 100-mile radius
  - Produced within a 200-mile radius
  - Produced within the county
  - Produced within the State
  - Produced within the region
- Why define local?
  - Local may need to be defined for specific programs (e.g., state incentives)
  - Defining local allows School Food Authorities to track purchasing and create benchmarks
  - Defining local allows schools to use Geographic Preference for purchasing (which will be discussed later in this section)
- The Whole Plate!
  - Local can span the whole plate, including all meal components.



## Slide 29: How Schools Source Local Foods

*Regionalization tip: Find an example of an online sourcing database utilized in your region, update slide, and pull it up for participants to explore, if desired.*

### [Talking Points]

- How do school districts source local foods? Through a variety of sources, including these:
  - Direct from producers
  - Distributors
  - Food service management companies\*
  - Local retailers
  - Processors
  - Food hubs and aggregators
  - Gardens
  - USDA Foods

\*Food service management companies manage vendor contracts but may not manage day-to-day procurement processes.

- Depending on location, there may be well-developed procurement channels for school districts to utilize when sourcing certain products. There are also third-party marketing services to support local procurement. These include companies such as [Farm Logix](#), platforms like [MarketMaker](#), and online databases housed by nonprofits (like [CAFF](#)) or State Agencies (for example [New York State](#)).
- Additionally, State Farm to School Coordinators, State Departments of Agriculture, Cooperative Extension offices, and local/regional nonprofits working in food systems are all excellent resources for sourcing local foods.

*Facilitator prompt: Module 2 goes in-depth on these market pathways and the ways in which producers can access them. This section provides a high-level overview to introduce the various ways in which School Food Authorities source local foods.*



### Slide 30: How Schools Incorporate Local Products

*Regionalization tip: Highlight any state-endorsed campaigns in your region when talking about Harvest of the Month and State plates below.*

#### [Talking Points]

There are many ways that schools incorporate local products:

- Meals—Including breakfast, lunch, and dinner
  - Also, condiments, entrée ingredients, spices, salad bars
- Harvest of the Month and State plates (or other state-endorsed campaigns)
- Snacks (including the Fresh Fruit and Vegetable Program)
- Taste tests and educational activities
- Special events, such as community meals or fundraisers

School districts may not start right away with large amounts of local product in meals. They may prefer to start with a one-time event or tasting. These opportunities can provide a pathway for relationship development and future purchases, which we will discuss further in future modules.

*Facilitator prompt: The aim of this slide is to reiterate the diversity of options for including local foods in school meals, beyond the lunch tray. You can also reiterate that these options may be important pathways for producers to align with SFA interests and needs in order to increase the amount of local food that schools purchase. Starting small can help cultivate a relationship for future purchases.*



### Slide 31: School Foodservice Cycles

#### [Talking Points]

- As a producer, it’s important to understand the unique timing of School Food Authority planning and procurement in order to best work with School Food Authorities. As you are learning, all child nutrition programs are different, but here are some general school foodservice trends:
  - The start (August/September) and end (May/June) of the school year are busy times for schools (and summer is typically a busy time for producers!). Use winter months to connect with schools, or find out the best time for the school district, and begin relationship development.
  - Most schools do menu planning in January/February; however, most menus have flexibility built in, such as:

- Stating “fruit or vegetable side” which allows for School Food Authorities to substitute an item from the same category. In addition, fresh products can be swapped for frozen or canned. Fresh products are generally preferred by School Food Authorities (and students).
  - Salad bars are often included in the menu and provide lots of flexibility as well—especially for smaller quantities, seasonal offerings, and new products (great way to “test” them out).
  - In other words, don’t assume that a School Food Authority isn’t interested in purchasing your products just because they’re not listed explicitly on the menu.
- School purchasing cycles vary and solicitations are issued throughout the year.
- Formal solicitations (Request for Proposals/Invitation for Bid) are often issued in early spring (Feb/March), have a set time frame for response, and common duration of one school year (though timing and duration may vary). (Module 2 will go further in depth on solicitations.)
  - Informal purchases are made throughout the year, and can vary in duration (one-time, limited duration).



### Slide 32: Applied Activity: Case Study Review and Discussion – optional, encouraged

*Activity objective: Producers will consider how their products can be incorporated into school meal programs. Use Worksheet 1B: Finding the Right School Meal Program for You and the Bringing the Farm to School Case Study excerpts in the [Producer Workbook](#).*

*Facilitator prompt: Plan about 15 minutes for this activity.*

#### *Bringing the Farm to School Case Studies:*

- Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)
- Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&R Poultry and Produce)
- The Right Product and The Right Partnership (Kenneth Sweat, Sweat’s Produce)

*Facilitator prompt: For this activity, producers will be reviewing written excerpts from the written and podcast case studies above. Refer producers to the [Bringing the Farm to School Case Studies page](#) to read and listen to the full case studies.*

#### *[Talking Points]*

- To better understand how school meal programs purchase and serve local foods, we are going to look at some case studies.
  - *Direct attendees to the three case-study excerpts in the Producer Workbook. Assign each table a case study to read.*
- Once you read the case study, you will spend some time discussing these questions at your table: (12 min)
  - What makes the school meal program and school district in the case study a good fit for the producer in the case study?
    - Size, scale of production, kitchen capacity
  - Based on what you read in the case study, would you consider selling to this type and size of school meal program? Why or why not?

- Do you have experience selling to school districts for school meal programs? What have been the benefits or challenges for you?
- Group share back (3 min)
  - What are the key factors you saw in the case study that made the producer a good fit for the school meal program type and size?
    - List these on a flip chart



### Slide 33: School Food Procurement 101

#### [Talking Points]

Why do you need to know the basics of procurement?

- Procurement practices/policies define purchasing potential and drive market standards.
- Understanding how School Food Authorities procure food will help you better determine how to enter the market (market channels) and identify market opportunities (which school meal programs are right for you).



### Slide 34: Procurement Standards

*Regionalization tip: Include relevant Tribal, state, or local regulations as examples in this slide.*

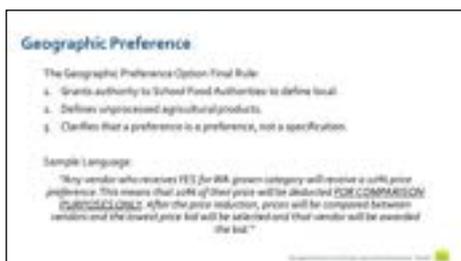
#### [Talking Points]

Procurement standards and regulatory requirements are guidelines that School Food Authorities must follow to remain in compliance with federal procurement regulations. Because School Food Authorities are using taxpayer dollars, there are controls put in place to make sure those dollars are used efficiently and effectively.

- Buy American Provision
  - Schools are required to buy American-grown and-processed food whenever possible.
  - Generally, purchasing locally produced food helps meet this requirement.
- Free and Open Competition
  - Procurement must support “full and open competition,” ensuring all competitors are on a level playing field.
  - Schools cannot specify local but can target in other ways. Module 2 will provide further detail.
- Responsive and Responsible
  - Responsive – Vendor/producer must respond to requests in a way that meets all elements of that request.
  - Responsible – Vendor/producer must be able to meet all the elements of request.
- Federal, Tribal, State and Local Regulations (Products: meat, dairy, eggs)
  - Tribal, state, or local entities might have specific regulations that influence procurement. The regulations may be more restrictive than federal procurement standards. The more restrictive regulation must be met.
- Regulations related to Small, Minority, and Women-Owned Businesses (2 Code of Federal Regulations Section 200.321)
  - The federal government encourages program operators to take steps to contract with small, minority, and women-owned businesses, when possible. This includes dividing solicitation requirements, when economically feasible, to ensure maximum participation.

- Food Safety
  - The USDA Food and Nutrition Service does not mandate food safety requirements. Requirements for food safety differ from state to state and School Food Authority to School Food Authority. This information is often included in the vendor requirements section of a solicitation but can present as a specification, as well. Food safety planning will be discussed in detail in Module 4.

*Facilitator prompt: Producers do not need to know these principles in detail, but they should be able to see how these principles can benefit them as producers. They should also understand the primary reason for these principles (and other procurement regulations in place): to ensure tax dollars are spent competitively, efficiently, and effectively.*



## Slide 35: Geographic Preference

### [Talking Points]

The Geographic Preference Option (Passed in the 2008 Farm Bill) allows School Food Authorities “to use a geographic preference for the procurement of unprocessed agricultural products, both locally grown and locally raised.”

- The Geographic Preference Option Final Rule:
  - Grants authority to School Food Authorities to define local.
  - Defines unprocessed agricultural products.
  - Clarifies that a preference is a preference, not a specification.
- As will be further explained in Module 2, School Food Authorities cannot specify local in their specifications, but they can use the Geographic Preference Option to demonstrate a preference for local.
- School Food Authorities using the Geographic Preference Option will specify a preference for local in their solicitations.
- This preference may be given by adding points or adjusting submitted bid prices of local producers in a bid comparison, meaning that even if your actual proposed price is higher than other bidders, your adjusted points or pricing, based on Geographic Preference, may make yours the best price in comparison.
  - When School Food Authorities use Geographic Preference, it doesn’t change how much you as a producer would be paid for a product, but it changes the bid price just for comparison.
- Here is an example from Washington State of language you might find in a Request for Quotes from a School Food Authority that uses Geographic Preference Option:
  - “Any vendor who receives YES for WA-grown category will receive a 10% price preference. This means that 10% of their price will be deducted **FOR COMPARISON PURPOSES ONLY**. After the price reduction, prices will be compared between vendors and the lowest-price responsive and responsible bidder will be selected, and that vendor will be awarded the bid.”



## Slide 36: Procurement Methods

*Regionalization tip: Federal threshold rates are included, but trainers should provide examples of state & local dollar thresholds and note potential differences.*

### [Talking Points]

School Food Authorities utilize a variety of procurement methods. The type of method applied is dependent on the dollar value of the purchase. Procurement Methods (Code of Federal Regulations Section 200-320)

- Micro Purchase
  - Micro-purchase threshold (Federal) – \$50,000 (or the state/local threshold – most restrictive threshold applies)
  - Non-competitive (solicitation not required) but must not limit competition
    - Equitable distribution across qualified suppliers is best practice (not requirement)
  - This might be a one-time order from a School Food Authority or a purchase agreement for four orders under \$50,000 (or the state/local threshold)
  - Micro-purchases can be a valuable pathway to purchase from multiple local producers or for special local foods events (Harvest of the Month, Local Apple Crunch, etc.)
- Informal
  - Small purchase threshold (Federal) – \$250,000 (or the state/local threshold – most restrictive threshold applies)
  - Price/rate quotes (“Three Bids and Buy”)
    - Requires specifications of product; document at least three bids
  - This might be an over-the-phone or an email request for a price quote or a more formal request for quotes (RFQ)
- Formal
  - Invitation for Bid (IFB) to award a fixed-price contract
  - Request for Proposals (RFP) to award either a fixed-price or cost-reimbursable contract

Although these may seem complicated, the procurement processes are important to ensure full and open competition is achieved and taxpayer dollars are used appropriately.



## Slide 37: Procurement Process

### [Talking Points]

Though procurement methods can vary greatly in application, the procurement process remains largely the same, regardless of the size and scale of the purchase (with some slight variations). This is the process that the School Food Authority goes through to procure foods.

- Develop solicitation, including
  - Specifications that describe in detail the product needed;
  - Details on estimated volume, frequency, and packaging needs;
  - Timeline for purchase and delivery;
  - Terms and conditions, etc.
- Advertise
  - Public publishing and outreach
- Award contract
  - Evaluate bids/responses to determine the lowest responsive and responsible bidder/offer most advantageous to the Program with price as the primary factor for contract award
  - Fixed-price or cost-reimbursable contract
  - May utilize geographic preference in decision making
  - Can also consider forward contracting (discussed further in Module 2)

- Manage contract
  - SFA monitors contractor performance for compliance with specifications, terms, and conditions of its contracts.

In Module 2, we will review your role as a producer through each of these steps.

*Facilitator prompt: Module 2 expands upon each step in the procurement process from the vendor/producer perspective. This slide gives a high-level overview that subsequent modules will build upon.*



### Slide 38: Conclusion and Next Steps for Module 1 (Section Header)



### Slides 39-44: Applied Activity: School Food 101 Full-Group Game

*Activity objective: Participants will engage in a full group game of School Food 101: True or False. The goal of this activity is to address common misconceptions and provide clarity on the basic principles relevant to producers.*

*Activity objective: Plan about 5 minutes for this activity.*

#### [Talking Points]

##### True/False Questions:

- If I am not a fruit and vegetable producer, I cannot sell my products to Child Nutrition Programs.
  - False: Local foods can span the plate from fruits and vegetables to meat, milk, dairy, and grains.
- The only way to get my products to children is through school lunch.
  - False: There is a wide variety of Child Nutrition Programs in addition to the National School Lunch Program, including School Breakfast Program, Fresh Fruit and Vegetable Program, and the Child and Adult Care Food Program. Local foods can be served for meals (including breakfast, lunch, and dinner), snacks, taste tests, special events, and classroom activities.
- Schools might be particularly interested in the sweet potatoes I grow because they are required to serve red/orange vegetables.
  - True: Schools are required to serve a certain amount of red/orange vegetables each week. Sweet potatoes, peppers, carrots, winter squash, and more can help them fulfil this requirement.
- There is no way that schools can afford to purchase my products with their spending limitations.
  - False: Although the reimbursement rates for school meals may be limited, School Food Authorities have flexibility to spend more on some local foods while balancing their budgets by using less-expensive products in other places.
- Different School Food Authorities and different Child Nutrition Programs require different volumes of product.
  - True: The size and type of program, age of children served, mode of serving (e.g., plated vs. salad bar) all influence the volume of product needed. This variation means it is possible to find a program that fits your production size and scale.

- The United States Department of Agriculture dictates food safety requirements for schools.
  - False: Food safety requirements are established at the state or Food Service Authority level. Learn more about food safety in Module 4.



### Slide 45: Questions for Reflection — Where Are You Now?

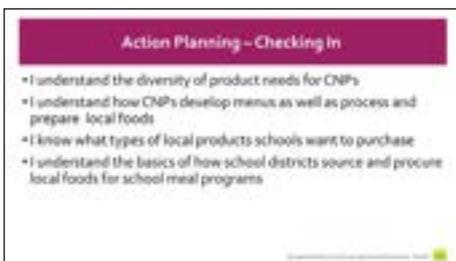
#### [Talking Points]

Reflecting on what you have learned in Module 1, how does your current production and infrastructure align with school market needs?

- Type and variety:
  - What products am I already growing that would be of interest to School Food Authorities?
- Size and scale:
  - Based on the descriptions in this section, what (general) size of program do I have the capacity to grow for (small, medium, large)?
- Level of processing:
  - Can I offer fresh, whole, unprocessed product and/or minimally processed product?
- Market channels:
  - What relevant market channels am I already selling through (direct, food hubs, distributors, etc.)?
- Food safety:
  - What are my existing food safety protocols or documentation?

The content in the following modules will help you dive deeper into these questions and consider how to build on your current production, infrastructure, and market channels.

*Facilitator prompt: Ask participants to reflect on and make note of their responses to these prompts.*



### Slide 46: Action Planning: Let's Check In!

#### [Talking Points]

- I understand the diversity of product needs for CNPs.
- I understand how CNPs develop menus as well as process and prepare local foods.
- I know what types of local products schools want to purchase.
- I understand the basics of how school districts source and procure local foods for school meal programs.

*Facilitator prompt: Prompt participants to pull out their Producer Workbooks and go to the School Business Action Planning Guide in Appendix A. Next, have them complete the Module 1 “Check-In” by answering the Essential Producer Questions and adding potential action items to their School Business Action Plans.*

*Depending on your overall training schedule, this may be a good time to take a break.*

# MODULE 2: SELLING TO SCHOOL MARKETS

## About Module 2

Producers may consider selling to school markets for a variety of different reasons, but ultimately, they want to know how to make the sale. In this module, you will walk producers through this process. By the end of the module, producers will have the information needed to assess their operational capacity to meet the standards for various school market channels, and they will have an action plan that identifies next steps for connecting with their chosen market channels.

MODULE 2: SELLING TO SCHOOL MARKETS			
Estimated Time: 2 Hours			
Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>A. Farm to School Market Channels</b> Duration: 45 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>Identify the best market channels for selling to schools, based on their operation's capacity and goals</li> </ul>	<ol style="list-style-type: none"> <li><b>1. Introduction</b> <ol style="list-style-type: none"> <li>Overview of Farm to School Market Channels</li> <li>How Does Your Product Get to the School?</li> </ol> </li> <li><b>2. Intermediated Market Channels</b> <ol style="list-style-type: none"> <li>Local Retail Outlets</li> <li>Food Hubs</li> <li>Regional Distributors</li> <li>National Wholesale Distributors</li> </ol> </li> <li><b>3. Direct-to-School Market Channels</b> <ol style="list-style-type: none"> <li>School Buyers</li> <li>Collective Purchasing Models</li> <li>Benefits &amp; Drawbacks</li> </ol> </li> </ol>	<b>Slide Deck (slides 1-20)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>Full Group Activity: Exploring Food Hubs (10 minutes)</li> <li>Wrap-Up: Choosing the Market Channel Mix That Works Best for You</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>Local and/or regional food hub list or map</li> <li>Worksheet 2A: Common School Vendor Requirements</li> </ul>
<b>B. Selling to School Districts</b> Duration: 60-75 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>Understand common product-quality standards for school markets</li> <li>Understand how to meet common vendor requirements of school markets</li> <li>Understand how to work effectively with school buyers</li> </ul>	<ol style="list-style-type: none"> <li><b>1. Selling to School Districts</b> <ol style="list-style-type: none"> <li>Understanding School Solicitations</li> <li>Finding School Solicitations</li> <li>Exploring Product Specifications</li> <li>Common Vendor Requirements</li> <li>Responding to School Solicitations Market Channel Assessment</li> <li>Connecting with School Buyers</li> <li>Approaching School Nutrition Directors</li> </ol> </li> <li><b>2. Conclusion &amp; Next Steps</b> <ol style="list-style-type: none"> <li>Choosing the Market Channel Mix that Works Best for You</li> <li>Action Planning: End-of-Module Check-In</li> </ol> </li> </ol>	<b>Slide Deck (slides 21-32)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>Small-Group Activity: Exploring Product Specifications (15 minutes)</li> <li>Pair and Share: Practice responding to school solicitations (20 minutes)</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>Appendix C: Sample Solicitation (or use a local example!)</li> <li>Worksheet 2B: School Market Readiness Evaluation</li> <li>Special materials needed: list of local food products for small groups</li> <li>Worksheet 2C: School Solicitation Worksheet</li> <li>Worksheet 2D: School Nutrition Director Meeting Guide</li> <li>Special materials needed: School Solicitation Packet (Appendix C)</li> </ul>

*Facilitator note: We highly suggest wrapping up Module 2 with a panel featuring local procurement champions from your region. Guidance for this panel is provided in the [Planning a Panel](#) tool found in Appendix A.*

## Module 2: Background Information for Facilitators

### Core Concepts

- Food supply chain and market channels
- Distributor and wholesale marketing practices
- On-farm food safety basics
- Product standards, grading, and specifications
- School procurement process and common vendor requirements
- School district food service roles

## Digging Deeper

- [How to Sell to Produce Distributors](#), North Carolina State Extension
- [Collective Purchasing of Food for Federal Nutrition Programs Fact Sheet](#), Public Health Law Center
- [Market Channel Selection Tool](#), Michigan State University Center for Regional Food Systems
- [USDA Grading and Product Standards](#), USDA Agricultural Marketing Service
- [Procuring Local Foods for Child Nutrition Programs](#), Institute of Child Nutrition and USDA Food and Nutrition Service

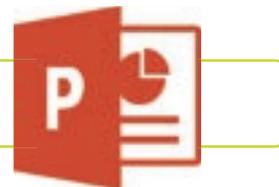
## Bringing the Farm to School Case Studies

- Food Hubs
  - **Written Case Study and Video:** Farm to Food Hub to School (Profile of Food Connects Food Hub, Vermont)
  - **Podcast:** Farm to School to Farm Again (Alicia Ellingsworth, KC Food Hub and KC Farm School, Missouri)
  - **Video:** [Frozen Fresh](#) (In Good Co. Detroit; Michigan Farm to Freezer)
- Distributors
  - **Written Case Study:** Local Produce through DoD Fresh in Montana (Grasmick Produce)
  - **Podcast:** Is Farm to School Distribution via DoD Fresh Right for You? A Conversation with Chris Gaskell from Grasmick Produce
  - **Video:** [Growing Farm to School: Partnering with A Distributor](#) (Amazing Grace Family Farm, Wisconsin)
- Direct to School
  - **Written Case Study and Podcast:** Leveraging Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm, New Mexico)

## Key Terms

- Local food supply chain
- Market channel
- Intermediary
- Wholesaler
- Aggregator
- Independent distributor
- Broadline distributor
- Food hub
- Food broker
- School nutrition directors
- Collective purchasing
- PACA licensing
- GAP
- Food safety plan
- Specification
- Post-harvest handling practices

- Download slide deck [here](#)



## Module 2: Introduction



Slide 1: Module 2: Selling to School Markets (Title Slide)



Slide 2: Learning Objectives

### [Talking Points]

- Now that you have learned about Child Nutrition Programs and how they fit into school procurement, we will talk about the various channels for getting your product into schools.
- In Section A, you will learn about the various types of market channels you can utilize to sell your products to schools, as well as common benefits, potential drawbacks, and important considerations for your farm, so that you can determine the best market-channel options for your business.
- Next, in Section B of this module, you will learn more details about making direct-to-school sales work for you, such as meeting school market standards, understanding common vendor requirements, and approaching and establishing effective working relationships with school buyers.
- We will wrap up the module with an end-of-module action-planning activity where you will identify any knowledge gaps you may still have and begin outlining your goals and next steps for establishing effective working relationships with school buyers.



Slide 3: Applied Activity – Let's Play Jeopardy

### Facilitator prompt:

- This is an optional activity to get producers familiar with the terminology in this module. Use the key terms from this module, the glossary, and instructions from [How to Create a PowerPoint Jeopardy Quiz](#) to create the activity. Participants will guess the proper term by saying "what is..."
- Plan 10-15 minutes for this activity

## Section A: Farm To School Market Channels



Slide 4: Section A: Farm to School Market Channels (Section Header)



## Slide 5: Overview of Farm to School Market Channels

*Regionalization tip: Update slide to include local and regional statistics, if possible.*

### [Talking Points]

- A farm to school market channel can be defined simply as the path your product takes from your field to a school.
  - *Audience Poll: Who has experience selling directly to schools? Selling through an intermediated market channel, such as a regional distributor?*
- According to the USDA Farm to School Census, 63% of school districts that participate in farm to school report that they get local food through intermediaries such as distributors.
- Forty percent of schools report that they get local food through a farmer directly.
- Although it's relevantly easy to find an intermediary that sells to schools, direct-to-school markets have a lot of potential, too! As the producer, you can decide the direction(s) that works best for your farm.

*Facilitator prompt: Encourage participants to name specific market channels and note these on a flip chart. Make sure to note who shared, so that you can refer to them later to help address questions from their experience.*



## Slide 6: How Does Your Product Get to the School?

### [Talking Points]

- There are three primary channels that you can utilize to get your farm products into school markets:
  - Intermediated markets
  - National wholesale distributors
  - Direct-to-school
- Within each of these market channels, there are several outlets and approaches to getting your products into the school market.
- We will dig more into these options throughout this module, so that you can determine the best market channel for your products based on your goals, products, and scale. This may include a mix!



## Slide 7: Intermediated Market Channels

### [Talking Points]

- Intermediated market channels can include:
  - Local retail outlets
  - Food hubs
  - Regional distributors
- As we discussed in Module 1, school districts need to choose the approach that works best for their programs. Therefore, schools with newer farm to school programs may source local products from a distributor to get started and then look into developing direct purchasing relationships with producers.
- However, schools may also end up sourcing from multiple market channels, which means more options for you to get your products into the school!
- Selling local products to schools through intermediated market channels can provide many potential benefits and drawbacks for producers. We will dig more into the specifics in the following slides.

*Facilitator prompt: The term “intermediated market” was first discussed in the 2006 Agriculture Resource Management Survey as a market channel that is one step removed from the end consumer such as restaurants, food hubs, and grocery stores. Technically, direct-to-school (and other institutions) would be considered an intermediated market channel, but they are differentiated in this training. According to the USDA ERS, “intermediated marketing channels include sales to regional distributors and grocery stores, restaurants, or other retailers.”*



## Slide 8: Selling to Schools Through Local Retail Outlets

### [Talking Points]

- Local Food Cooperatives: These member-owned entities can vary from retail outlets to volunteer organizations. They uphold cooperative principles and prioritize benefits for consumers and producers as community stakeholders. *Example: La Montañita Co-Op in New Mexico*
  - Benefits and drawbacks: They can facilitate purchasing arrangements with schools by aggregating, storing, and/or delivering product. However, depending on the structure and mission of these businesses, vendor requirements and fees for these services can be substantial.

*Facilitator prompt: Encourage participants to name specific retail outlets working with schools in the region, and note these on a flip chart. Make sure to note who shared, so that you can refer to them later to help address questions from their experience.*



## Slide 9: Selling to Schools Through Food Hubs

### [Talking Points]

- Food Hubs: These businesses are often local or regional in scale and aim to be financially viable while also having positive economic, social, and environmental impacts within their communities. They often aggregate multiple producers’ products and distribute directly to consumers, grocery stores, and sometimes schools. *Example: The Common Market in Pennsylvania, Georgia, and Texas*
  - Benefits and drawbacks: Food hubs can be local procurement champions! They coordinate the aggregation, distribution, and/or marketing of locally and regionally produced foods from multiple producers, often to multiple school markets. In addition, they often support value-added processing and can provide resources to help producers meet certification and insurance requirements for school markets. However, they may require significant time commitment from producers, especially if they are not already marketing to school districts.

*Facilitator prompt: Encourage producers to explore the Farm to Food Hub to School: Food Connects case study in their [Producer Workbook](#), which takes a deeper dive into working with a food hub that sells to schools. Producers may also be interested in seeing food hubs in action:*

- Listen to the podcast about [Kansas City Food Hub and Kansas City Farm School](#) (available on the [Bringing the Farm to School Case Studies page](#)).
- Watch the video about [Michigan Farm to Freezer](#).



## Slide 10: Applied Activity – Exploring Food Hubs

**Activity objective:** Producers will learn more about food hubs in their area so that they can assess whether this is a viable market channel for them to consider. Consider having a regional food hub representative present for this activity.

**Facilitator prompt:** Plan about **10 minutes** for this activity. If the AMS list is not up to date for your region, utilize relevant local and regional resources. Make sure to identify these resources ahead of time so you can share with participants for this activity.

- A [list of food hubs](#) is available through the USDA Agricultural Marketing Service (AMS)
  - Visit the website and use the tool to generate a map of the states represented in your training.
  - When displaying the map, poll your audience to see who has worked with a food hub and note this on a flip chart.
  - Open it up to the group to define the pros and cons of selling through food hubs.



## Slide 11: Selling to Schools Through Regional Distributors

### [Talking Points]

- Regional Distributors: These businesses can range in scale, though they commonly include small and medium-sized, local/regional, and family-owned businesses. *Examples: Food 4 Thought, American Produce in San Diego*
  - Benefits and drawbacks: Not all distributors serve school markets, but when they do, this can greatly reduce the marketing burden for producers. Regional distributors can often be more flexible in working with small producers and may be willing to accept smaller volumes and a wider variety of products.

**Facilitator prompt:** Encourage participants to name regional distributors working with schools, and note on a flip chart. Make sure to note who shared, so that you can refer to them later to help address questions from their experience.



## Slide 12: Considerations for Selling to Schools Through Regional Distributors

### [Talking Points]

- Regional distributor channels can be a good match for producers familiar with wholesale practices and those needing support for distribution to school sites.
- There are many examples of regional distributors who source from small and diversified farms in a region (or through food hubs) to meet product demand of larger school markets.
- Many distributors rely on established suppliers; therefore, engaging in school sales through distributor channels can be a challenge for producers who are more experienced selling direct-to-consumer. Here are some important considerations for selling to school through distributors:
  - Most distributors will require some memorandum of understanding (MOU) or even forward contract. Use clear communication when constructing a production contract. Good contracts outline clear expectations and plan for the unexpected.

- Most distributors will require a food safety plan, and many require certification such as Good Agricultural Practices (GAP) and/or on-farm inspections of food safety practices. Food safety certification requirements and communications with your buyer are discussed in more detail in Module 4.
- Product quality is an important consideration. Be sure to discuss post-harvest handling and review the standards outlined in your agreement.
- Most distributors will expect a computerized invoice and recordkeeping program (such as QuickBooks). A program like this is something you'll want to be sure to include in your marketing plan.
- Don't forget to discuss contingency plans for addressing the unexpected (such as crop failure, natural disasters, etc.), and incorporate them into your contract appropriately (i.e., force majeure clauses).

**Facilitator prompt:** Encourage participants to return to these considerations when completing the activity *Choosing the Market Channel Mix That Works Best for You* at the end of this section.

For producers interested in learning more about the logistics of working with a distributor, encourage them to watch the [Growing Farm to School – Partnering with a Distributor](#) video.



### Slide 13: National Wholesale Distribution Channels

#### [Talking Points]

- National Wholesale Distributors include the following:
  - Broadline distributors
  - Foodservice management companies
  - USDA Food Distribution Programs, such as USDA Foods and DoD Fresh
- National wholesale distribution can be a good match for producers familiar with wholesale practices, those wanting to access school markets to move large product volumes, and those seeking support for distribution to school sites. Most operate on a national scale, but they have regional warehouses and some are highly motivated to buy local products.
- Most schools already receive products from distributors and sometimes refer to these companies as a “prime vendor.” These businesses aim to provide as many products as possible to as many customers as possible, and achieve this by becoming experts at logistics and supply-chain management.
- National wholesale distributors rely on large, established suppliers; therefore, vendor requirements, contracting processes, and required product volumes can be hard for smaller producers to meet (and benefit from).
  - Product grading standards are strictly adhered to; most distributors require Grade A standards for unprocessed products.
  - Product traceability and food safety certifications, such as Good Agricultural Practices (GAP)/Good Handling Practices (GHP), are almost always required.
  - Payment schedules for distributors can vary (for example, 30- or 60-day payment schedule is not unusual for broadline distributors). Be sure to clarify expectations in contracting and account for this in your cash flow.

**Facilitator prompt:** For producers interested in learning more about the logistics of working with a wholesale distributor like DoD Fresh, encourage them to read about and listen to a podcast on *Local Produce through DoD Fresh in Montana* on the [Bringing the Farm to School Case Studies](#) page.



## Slide 14: Direct-to-School Supply Chains

### [Talking Points]

- Direct-to-school supply chains are what many people think of first when they hear “farm to school”: a purchasing relationship directly between a local producer and the school buyer. This approach emphasizes the connection between the producer and the consumer (in this case, the students) and is considered a local supply chain model.
- When selling to school markets, producers market their products directly to school districts and coordinate logistics such as distribution/delivery.
- We will discuss a variety of approaches that producers can use to access school markets through direct market channels later in this module.



## Slide 15: Direct-to-School Buyers

### [Talking Points]

- School districts can have very different approaches to procurement, depending on the school nutrition program model and goals. Therefore, the individuals responsible for school food procurement can have many different titles and responsibilities. Here are some common titles for school buyers:
  - School Food Authorities
  - School Nutrition Directors
  - School Foodservice Managers (FSMC)
  - Procurement Managers



## Slide 16: Direct-to-School Market Channels

### [Talking Points]

- We will dig into the details of selling directly to school districts later in this module, but common approaches include the following:
  - Farmers Markets and Farm Stands: Producers can sell directly to schools through farmers markets they may already be utilizing. It is not uncommon for School Nutrition Directors to visit these markets to source local foods and identify potential vendors. This allows them to meet producers, seek competitive pricing, and take advantage of seasonal crop trends.
  - Community Supported Agriculture: Sometimes, schools may become a CSA drop site or offer a “farm-raiser” in which the school receives a portion of produce sales. This is a great relationship-builder between schools and producers, and it can be a steppingstone for getting more products into the cafeteria.
  - School Contracts and Purchase Orders: Producers can sell directly to school districts, utilizing both formal and informal procurement methods.

*Facilitator prompt: Remind participants to review the Digging Deeper section in their [Producer Workbook](#) for additional examples and case studies.*



## Slide 17: Collective Purchasing Models

*Regionalization tip: Identify any existing school purchasing groups, farm to school coordinators, and/or incentive programs in your state and region to include as examples.*

### [Talking Points]

- Some school districts participate in state and regional purchasing cooperatives and buying groups to utilize collective purchasing. This allows multiple

school buyers to purchase as a group, rather than making purchases individually. Generally, this helps school districts obtain greater buying power and lower prices than they would have when buying on their own, and reduces administrative burden.

- When collective purchasing is applied to farm to school sales, it can allow producers to access multiple school markets through a streamlined procurement process, therefore aggregating product demand, increasing product volumes, and expanding school sales.
  - Producers access these streamlined market channels by establishing themselves as an approved vendor/supplier for the buying group or purchasing cooperative. Purchasing models vary, but they generally utilize the formal procurement method (most often an RFP).

***Facilitator prompt:** This is not an option in every community and is more common in states that have Farm to School Coordinator positions and/or Local Food Procurement Incentive Programs. For more information, check out the Digging Deeper section.*

*Encourage producers to read about Leveraging Partnerships to Access School Markets in their [Producer Workbook](#). Participants can also listen to Anthony Youth Farm's experience with the purchasing cooperative on the [Bringing the Farm to School Case Studies](#) page.*



## Slide 18: Direct-to-School: Potential Benefits

### [Talking Points]

Direct-to-school market channels can provide many benefits, including:

- **High levels of customer satisfaction:** the shortened supply chain helps ensure product can be very fresh and maintain quality standards.
- **Retained brand that helps grow your business:** cafeteria-based education programs are great opportunities to promote your farm and integrate marketing materials. *Examples: Know Your Farmer campaigns and Harvest of the Month programs*
- **A potential market for lower-grade products (i.e., USDA Grade B or C):** there can be flexibility in product specifications and standards compared to other wholesale markets.
- **Direct lines of communication:** opportunities to determine areas of flexibility and potential negotiation. These support relationship-building, which increases the likelihood of continued sales.
- **Increased competitiveness in bidding processes:** ability to differentiate your value as a potential vendor by supporting educational opportunities such as farm visits and farmer-in-the-classroom programs.
- **Local decision-making processes:** school food procurement policies are largely defined at the local level, meaning that requirements may be less stringent (and more appropriate to your farm characteristics) than those of some intermediaries.

***Facilitator prompt:** Do not simply read through the examples on the next 2 slides! Revisit the notes you made during the audience poll at the beginning of the module. Encourage the audience to name direct-to-school channels they have experience working with and the potential benefits, drawbacks, and important considerations for selling to them. Note common themes on a flip chart and address any assumptions or misconceptions utilizing local context and examples.*



## Slide 19: Direct-to-School: Potential Drawbacks

### [Talking Points]

- **Increased time spent marketing products:** establishing and managing relationships takes time! This means valuable time away from the farm and/or increased investment in staffing/labor.
- **Complexity of determining a fair price:** careful consideration is needed to make sure product price is competitive and allows the producer to recover inputs (labor, production, distribution, insurance)
- **Food safety standards:** infrastructure improvements may be necessary to ensure post-harvest handling systems align with required food safety standards (with regard to washing, processing, and storage of product)
- **Required documentation and recordkeeping:** quality-management and traceability systems are required to reduce liability in case of “the unthinkable” (i.e., food-borne illness/outbreak)
- **Potential requirement for increased distribution capacity:** school clients are accustomed to certain delivery and drop-off services from vendors.
- **Payment processes often require invoicing:** payment upon delivery is unlikely and potential lag time may put strain on your operational capacity.
- **Vendor establishment:** solicitation methods can be complex and procurement processes tough to navigate.



## Slide 20: Choosing the Market Channel Mix That Works Best for You

### [Talking Points]

- As we have just discussed, there are many ways to get your products into schools. These market channels offer diverse benefits and must be explored with key considerations in mind.
- The key is identifying a market channel (or multiple channels) that allows you to find the balance between what the buyer (the school) needs and what you, the producer, can reasonably produce and agree upon a price.
- Let’s take a moment to re-visit your farm goals and assess potential market-channel approaches that may work for your current operation, and/or that you would like to access in the future.
- Using the considerations outlined in your Producer Workbook, please note additional needs and next steps in your School Business Action Plan.

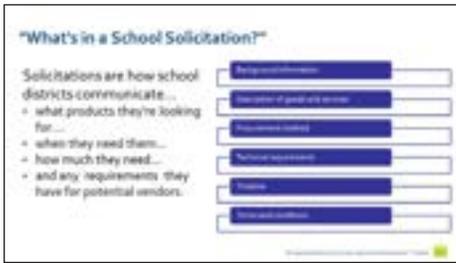
*Facilitator prompt: The take-away is that the producer gets to choose the best market channel for their operation to access school markets. Encourage producers to consider the channels that work best for their operation, including a mix of various channels. Refer producers to Worksheet 2A: Farm to School Market Channel Assessment (found in the [Producer Workbook](#)).*

## Section B: Selling To School Districts



*Facilitator prompt: The content for Section B is in the [Producer Workbook Appendix C: Direct-to-School Solicitation Packet](#). Please take some time to review the packet in detail before delivering this section. The packet contains a lot of information and resources for producers, much of which will need to be reviewed on their own time, outside of the training.*

### Slide 21: Section B: Selling to School Districts (Section Header)



## Slide 22: “What’s in a School Solicitation?”

### [Talking Points]

- Solicitations are how school districts communicate about what products they’re looking for, when they need them, how much they need, and any requirements they have for potential vendors.
- Solicitations are used both to solicit information from potential vendors (such as local producers) and establish terms for a contract.
- Let’s review the basics of a solicitation. Whether they are a conversation or a written document, solicitations typically contain the following information (or “building blocks”):
  - Background information: outlines goals and motivations of the program
  - Description of goods and services: outlines the product needs and specifications
  - Procurement method: outlines how the purchase will be evaluated and completed
  - Technical requirements: outlines vendor requirements and award criteria
  - Timeline: states duration of the purchasing agreement (e.g., time-limited with a closing date or ongoing)
  - Terms and conditions of the contract: states timeline and procedural requirements (i.e., defines responsive and responsible)

*Facilitator prompt: Remind participants to go to their [Producer Workbook](#) and access sample solicitations in Appendix C.*



## Slide 23: Accessing School District Solicitations

*Regionalization tip: Bring up a school district website to show how to locate a formal solicitation, or bring up a public solicitation host site or [MarketMaker](#) (if applicable in your state).*

### [Talking Points]

- There are several types of solicitations used by school districts seeking to purchase local products.
  - These vary from *informal solicitations*, such as providing quotes for micro and small purchases...
  - to *formal solicitations*, such as Requests for Proposals (RFP) or Invitations for Bid (IFB)
- **IMPORTANT:** if seeking formal purchasing relationships, school districts are required to publicly announce and advertise RFPs and IFBs.
- Informal solicitations do not require public posting. These can be conducted through direct outreach to producers with new or existing relationships to the school district.
- Schools use a variety of methods to communicate these solicitations:
  - Emails or phone calls initiated by school buyer: these can be a result of your marketing and promotion efforts, inclusion of your farm in state databases, recommendations from state agency representatives, references from past school customers, etc.
  - In-person conversations: these can occur through organized buyer meetings, farm to school events, or even interactions from direct-market channels such as farmers markets.



## Slide 24: Understanding Product Specifications

### [Talking Points]

- Now that you know where to look for solicitations to find out what schools are looking to purchase, we will dive into the details of meeting their product standards, or specifications. These are often described in the solicitation in detail and include:
  - **Product and variety:** for example, *heirloom/variety common for the region*
  - **Quality standards and size:** for example, minimally processed foods and *seconds* (ideally, they'll share what they're using the product for in the solicitation)
  - **Quantity and pack size:** for example, wholesale pack sizes versus sales by unit.
- Specifications are based on industry standards. School buyers may be accustomed to receiving Grade A products and wholesale pack size from distributors. However, that does not mean that these standards are necessary for their operation.
- **There is flexibility!** The school district can change its specifications, but only through a written amendment to the solicitation before it is announced.
- Producers can support this process by helping SFAs understand what standards are feasible for local producers to meet. In fact, your ability to deviate from standards might make your products more attractive to school buyers.
  - For example, small apples that don't meet other standards may be a great fit for schools. They're better for little hands and can be offered whole to students, minimizing processing time on the part of school food service.
- **Important!** Potential vendors must be able to meet the required specifications stated in the solicitation, or they will be considered "non-responsive."

**Facilitator prompt:** Examples of a solicitation pricing list indicating grading/pack size included in the [Producer Workbook](#), Appendix C.



## Slide 25: Applied Activity: Exploring Product Specifications

**Activity objective:** Producers will explore common regional products to define the quality standards and specifications, so that they can consider whether the standards for the products they are interested in marketing to schools align with the needs of school meal programs.

**Facilitator prompt:** Plan 15 minutes for this activity.

### Activity Instructions:

- *First, break participants into small groups. Provide each table with a regionally produced product and a copy of the Appendix C: Direct-to-School Solicitation (found in the Producer Workbook).*
- *Next, ask them to assess the product and determine the product grade using the standard product specifications provided.*
  - Does it meet the required specification? Why? Why not?
- *Then, ask participants to brainstorm different uses for the product as menu items.*
  - What school meal menu items would you make with this product and why?
  - How would you alter the specification to meet the needs of the new menu item?

- Would you incorporate new or lower-grade products?
- *To wrap up, bring everyone back together and have the groups share their assessment of compliance and the reasoning that got them there.*



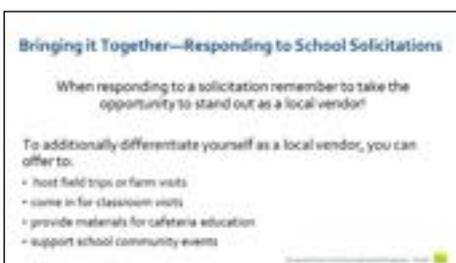
## Slide 26: Meeting Common School Vendor Requirements

*Regionalization tip: Update slide 26 to include state-level requirements for vendors selling to school districts. These most commonly include things like food safety certification or vendor registration systems.*

### [Talking Points]

- Vendor requirements vary by solicitation type and school district. However, there are some common requirements for potential vendors seeking to sell to school markets:
  - **Post-harvest handling practices:** harvest and wash-station procedures, product traceability and labeling information, and packing requirements (including details like new boxes or reusable crates)
  - **Food safety practices:** third-party certification programs (e.g., Good Agricultural Practices (GAP)/Good Handling Practices (GHP)), required infrastructure (e.g., stations and cold storage), and food safety plans (including documentation of practices)
  - **Insurance and licenses:** product liability insurance, auto insurance (in the case of delivery), business licenses and Perishable Agricultural Commodities Act (PACA) licenses for regional school markets
  - **Payment systems:** invoicing requirements, payment schedules and lag times (often no payment upon delivery), and registration in required vendor systems
  - **Distribution logistics:** delivery locations, schedules, and equipment requirements (e.g., accessing loading bays)
- It's important to know that some vendor requirements are mandatory (in order to comply with federal rules), while others are determined by the school district (for example, food safety or delivery requirements). Regardless, a producer responding to a solicitation must comply in order to be eligible for selection.

*Facilitator prompt: Many of these requirements will be covered extensively in Modules 3 and 4. If questions arise, note them on a flip chart and remember to address them when covering the relevant topics.*



## Slide 27: Bringing it Together—Responding to School Solicitations

### [Talking Points]

- Important tips to remember when responding to school solicitations:
  - Pay attention to the standard pack size and indicate your capacity to meet the request. This helps ensure that your pricing is appropriate (i.e., it is competitive based on volume) and that the school will be ready to receive your products with necessary storage and processing capacity.
  - A benefit of working directly with school districts is that sometimes producers can find opportunities to sell products to schools that might not meet the standards of other, pickier buyers (and therefore add profit to your operation). Discuss options for ungraded, or lower-grade products, and remember that there may be some flexibility here!

- For new product offerings (i.e., products the school has never purchased before) or ungraded products (if applicable), make sure to be proactive. Start by describing how you typically grade/sort and pack products and then ask how they would like to receive them and negotiate to come to a common agreement.
- Remember to keep school district needs in mind when negotiating potential deviation from standards. Specifications are utilized by School Food Authorities (SFAs) to ensure competitive purchasing (since only similar products can be compared) and to maintain predictable operational capacity (i.e., processing/staff training).
- It's also important to take the opportunity to stand out as a local vendor. You can indicate that you're interested in offering field trips, coming for classroom visits, providing marketing materials to support cafeteria-based promotion, and supporting special events. All of these activities are great examples of important offerings that add value to your products and differentiate you as a local vendor. Remember, in order to be considered responsive, potential vendors must be able to “deliver” on all the qualities named in the solicitation.

### Slide 28: Applied Activity – Responding to School Solicitations



**Activity objective:** Participants will apply their understanding of school solicitations, vendor requirements, and product specifications by practicing responses to multiple solicitation types.

**Facilitator prompt:** Plan 20 minutes for this activity. Refer participants to Appendix C of their **Producer Workbook** to locate the sample solicitation, and worksheets needed to complete this activity. For additional facilitator support, see **Producer Tools—Appendix B** of this guide for more information.

#### Activity Instructions:

- First, break participants into small groups. Ask each group to work together to review the solicitation models in Appendix C: Direct-to-School Solicitations included in the **Producer Workbook**.
- Next, ask groups to identify the solicitation “building blocks” shared earlier by highlighting the sections in the sample solicitation and answering the following questions on a flip chart:
  - What does the **Background Section** tell you about the school district’s farm to school goals? Be sure to identify any geographic preference information that could help you stand out as a local vendor!
  - What do the **Technical Requirements** tell you about the requirements for potential vendors?
  - What does the **Description of Goods and Services** tell you about the school district’s product needs?
- Then, ask groups to choose a product that they have experience marketing and/or growing, and respond to the solicitation as requested (do the following):
  - Vendor Requirements: Review the **technical requirements** to assess your business’ compliance with the stated requirements for potential vendors seeking to sell to the school district. Remind producers to use **Worksheet 2B: School Market Readiness Evaluation** to see how their business and operations align with school needs.
    - Does your business/operation meet the **technical requirements** for becoming an approved vendor with the school district?
    - Are there any stated preferences that you may qualify for as a local vendor, such as **geographic preference**?

- Can you prepare a bid that is **responsive** to the solicitation terms?
- Can you maintain **responsibility** for the stated contract terms?
- Product Information: Make sure your bid is competitive by completing the **product availability and pricing sheets** for ALL products you are interested in selling to the school district during the contract terms. *Remind producers to use the [Sample Solicitation](#) to see how their product-quality standards align with school needs.*
  - Provide product information: product specifications by variety, processing standards, grading standards and pack-size, availability of product quantities (season) and frequency, pack-size, and price, etc.
  - Do the product needs align with your quality management and post-harvest handling systems?
  - Do you have the ability to sort and grade products as requested? Are you able to meet pack-size requirements? Can you provide pricing information as requested?
- Farm to School Offerings: List any additional services/offerings you can provide the school district to stand out as a local vendor. *Remind producers to refer to [Worksheet 2D: School Nutrition Director Meeting Checklist](#) (in the [Producer Workbook](#)) for ideas on standing out as a local vendor.*
- *To wrap up, bring everyone together and poll audience members about their experience.*
  - Are the vendor requirements different than other markets they have experience selling to?
  - Are the product specifications standard or different from the way they typically pack or sell their products?
  - Was it challenging to provide pricing in this way? How? Why?

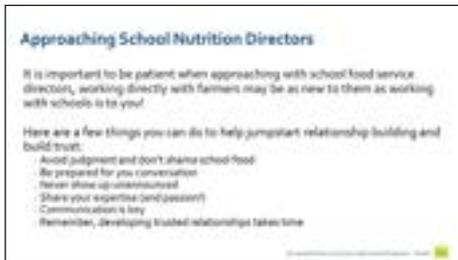


## Slide 29: Understanding What Motivates a School Nutrition Director [Talking Points]

- Do not assume that all schools have the same motivations and requirements! Knowing the current landscape of the school meal program you want to work with will help you decide how to best approach the School Nutrition Director, avoid common pitfalls, and ultimately make the sale.
- You should make an opportunity to meet with the School Nutrition Director (or other school buyer) to learn about their specific needs and requirements. Here are some key points to discuss together:
  - **Program goals:** Understanding the buyer’s professional and personal motivations may provide you with an opportunity to negotiate requirements based on shared values and priorities.
  - **Product needs:** Ask about the kinds of products they are interested in purchasing locally—how much and how often do they need products to be processed, and how are they used to receiving local products? You may also consider asking what they plan to make with the product. This question may reveal that there are unidentified flexibilities or new product opportunities.
  - **Sourcing practices and preferences:** Find out if they are interested in purchasing directly from you or if they prefer to work through a distributor. Depending on past experiences, they may have hesitations about sourcing through certain market channels. Be sure to find this out, so you can address potential issues proactively.
  - **Solicitations and procurement:** Ask what type of procurement method they typically use for the products you’re interested in selling, and what

the timing is for those solicitations. It's important to understand that certain products may commonly be purchased informally, while others may need to be purchased through formal methods, due to the dollar value of purchases.

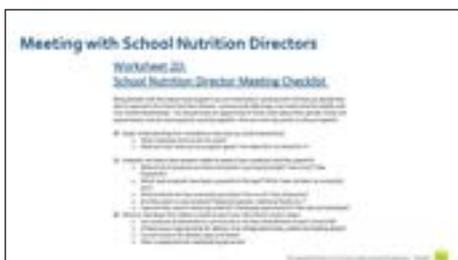
- **Payment:** Understanding the school's invoicing and payment processes is critical to anticipating cash-flow requirements and avoiding delays.
- **Contingencies:** It is important to make plans for addressing the unexpected, such as missed delivery, crop failure, natural disasters, etc. These things happen. What's important is that you establish clear expectations and have a mutual understanding for addressing them. This reduces risk and helps maintain working relationships.



### Slide 30: Approaching School Nutrition Directors

#### [Talking Points]

- It is important to be patient when approaching School Nutrition Directors. Working directly with farmers may be as new to them as working with schools is to you. Here are a few things you can do to help jumpstart relationship building and build trust.
  - **Avoid judgment and don't shame school food.** Remember, school nutrition staff are doing this work for many of the same reasons you farm: to feed hungry kids and support the community.
  - **Be prepared for your conversation.** Prepare an overview of your practices and list of questions to cover with the School Nutrition Director, to help ensure that the meeting is productive and benefits both of you. Take time to learn about them by practicing some basic school food vocabulary and reviewing menus. Consider bringing along some product to sample or marketing materials, so they can get to know you.
  - **Never show up unannounced.** School Food Authorities are often very busy and have broad diversity in their roles and capacity. Some may be running the whole show onsite at the school, while others are managing a complex program from a centralized office. Always call ahead, make an appointment if possible, and avoid busy times such as during lunch periods (i.e., 10 am to 1 pm).
  - **Share your expertise.** Proactively sharing information about your operational cycles (e.g., production planning, planting cycles, product availability, etc.) will help you find common ground and support negotiations.
  - **Communication is key.** Be sure to get direct contact information, ask them what their preferred mode of communication is (email, text, in-person), and establish follow-up actions.
  - **Remember, developing trusted relationships takes time.** It may be necessary to start slowly and build trust through offering samples, piloting sales, and pulling in support from local-food champions at the school.



### Slide 31: Meeting with School Nutrition Directors

*Regionalization tip: Update slide 31 to indicate local programs that support school marketing or current local marketing event opportunities (if relevant).*

#### [Talking Points]

- There are many opportunities for producers to connect face-to-face with school buyers, and this is often incredibly beneficial, as it provides a critical opportunity for building trust and addressing market-specific questions

about procurement processes and vendor requirements. Here are some ways to connect directly with school buyers:

- **Attending relevant conferences and trade shows:** Examples include the Association of State Departments of Agriculture Conference, State School Nutrition Association Conference, Sustainable Agriculture Working Group Regional Conferences, etc.
- **Hosting farm visits:** As a producer, this is a strategy to connect with schools by showing them your farm, ranch, or business operation and to make school nutrition professionals feel comfortable about and interested in your products and practices.
  - If possible, taste testing on-site is a good opportunity for school buyers to sample the quality of products you grow, raise, catch, or produce. Be sure to keep food safety at the forefront.
- **Collaborating with schools:** These events are a great time to make an initial connection with school buyers and establish next steps to follow up with a more detailed conversation. Additionally, many of these meetings may be informal one-on-one meetings between a producer and school buyer.
  - **Informational meeting:** This is a meeting, often hosted by schools, in which the schools can do “market research” by connecting with you, a potential vendor, in advance of a solicitation, to get information to inform their process.
    - This meeting is an opportunity for schools to explain the solicitation process and clarify/answer any questions you may have. It’s also a good time for you to let schools know what you may be able to offer them (crop, volume, etc.).
- **Production planning meeting:** Producers can host a meeting with a school’s Nutrition Director or other school nutrition professional after a solicitation has been responded to and a contract awarded.
  - During this meeting, you and the school can collaboratively plan the school menu and make decisions about what and how much to plant in order to prepare for the next school year, within the scope of the contract. As you know, it is best if this happens between the months of December and March for produce, and other times of year for additional products.

*Facilitator prompt: Remind participants to refer to Worksheet 2D: School Nutrition Director Meeting Checklist in their **Producer Workbook** to review important information to provide and points to cover, when meeting with school buyers.*



### Slide 32: Applied Activity—Considerations for Selling to School Districts

*Activity objective: In small groups, producers assess how direct-to-school market channels can address their motivations for selling to schools, and how they align with farm and business operation goals.*

*Facilitator prompt: If time allows, break participants into small groups (we recommend by production type/sector). The questions above are also included in the **Producer Workbook**.*

#### [Talking Points]

- It is important to assess how school market practices and vendor requirements align with your farm goals and capacity, to determine if selling directly

is a good fit. Here are some questions to answer now (or after meeting with a School Nutrition Director).

- Do you have time to market your products on your own? Do you have time to invest in developing and maintaining relationships?
- Do your farm goals align with their program goals? Does the school value direct relationships with producers? Promote local farms? Have supportive policies and programs?
- Do you have the capacity to meet the school’s product needs on your own? Do the volumes you sell align with the volumes they need?
- Can they take your products as they are? Do you have the infrastructure to do minimal processing?
- Do the packing and labeling requirements fit with your farm’s post-harvest handling? Do you have a traceability system?
- Do your quality-management systems align with the standards and specifications expected? Do you have grading equipment?
- Can you respond to solicitations in the method and timeframe expected? Are you ready to maintain consistent communication and troubleshoot potential issues?
- Do your farm capacity, product mix, and production volume allow you to price your products competitively? Can you afford potential payment delays?
- Are you interested in promoting your farm to the school community? Partnering on special events and field trips?

## Conclusion And Next Steps



**Slide 33: Conclusion and Next Steps** (Section Header)

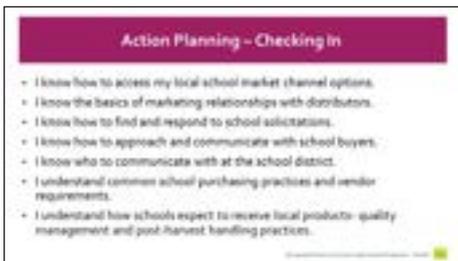


**Slide 34: Bringing the Farm to School Case Studies**

*Regionalization tip: Many states have local food promotion campaigns and/or Harvest of the Month programs. Highlight an example from your region!*

### [Talking Points]

Now that we have reviewed all the options you have for getting your locally produced products into school markets, we encourage you to explore how school buyers utilize creativity within their required procurement methods to add value to Child Nutrition Programs, target specific products, and meet the needs of local producers. These resources are included in the Digging Deeper section of the *Producer Workbook*.



## Slide 35: Action Planning: Let's Check In!

### [Talking Points]

Now that we have covered all the curriculum content in Module 2, let's check in!

- I know how to access my local school market-channel options: distributors and school districts.
- I know the basics of marketing relationships with distributors.
- I know how to find and respond to school solicitations.
- I know how to approach and communicate with school buyers.
- I know who to communicate with at the school district.
- I understand common school-purchasing practices and vendor requirements.
- I understand how schools expect to receive local products (quality management and post-harvest handling practices).

*Facilitator prompt: Prompt participants to pull out their Producer Workbooks and go to the School Business Action Planning Guide (Appendix A). Next, have them complete the Module 2 "Check-In" by answering the Essential Producer Questions and adding potential action items to their School Business Action Plans.*

*Depending on your overall training schedule, this may be a good time to take a break.*

# MODULE 3: CHOOSING THE RIGHT PRODUCT TO SELL TO SCHOOLS

## About Module 3

The previous module helped producers learn about and narrow down marketing channels for their products to enter into schools. This module will help producers have a better understanding of how their product fits onto the plate and determine the type of product that is a good fit with their chosen school market channel. It also explores whether any product adaptation will need to happen to meet the needs of school buyers and explains how producers can determine if the price point works for their farm.

MODULE 3: CHOOSING THE RIGHT PRODUCT TO SELL TO SCHOOLS			
Estimated Time: 1 hour			
Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>A. Choosing the Right Product</b> Duration: 30 minutes	Following this session, producers will: <ul style="list-style-type: none"> <li>Identify the products and amounts that schools might purchase, based on the previous lesson on selling to schools</li> </ul>	<ol style="list-style-type: none"> <li><b>Introduction</b> <ol style="list-style-type: none"> <li>Identifying Your Product and Volume Based on the School's Needs</li> </ol> </li> <li><b>What to Grow</b> <ol style="list-style-type: none"> <li>Understanding menus and preferences</li> <li>Rethinking Volume- Scale and Frequency of School Deliveries</li> </ol> </li> <li><b>School's Food Needs</b> <ol style="list-style-type: none"> <li>School Cooking Infrastructure</li> <li>How Often</li> <li>Special Events- Crunch Time; Farm to School Month</li> </ol> </li> </ol>	<b>Slide Deck (slides 1-16)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>Discussion on Products based on Modules 1-2 (5 minutes)</li> <li>School Menu Activity: Bring a local/ regional school menu. Look at sample school menus and have producers brainstorm what they might offer a school, based on a given equipment/labor/logistical setup.</li> <li>Values Pitch Roleplay (10 minutes)</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>Sample School Menu—get this locally!</li> <li>Video and Written Case Study— Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, AR School District)</li> </ul>
<b>B. Product Development</b> Duration: 30 Minutes	Following this session, producers will: <ul style="list-style-type: none"> <li>Learn how to assess which of their current products fit into school menus</li> <li>Learn how to assess some value-added options for their farm</li> </ul>	<ol style="list-style-type: none"> <li><b>What Range of Products Works with the School District's Need</b> <ol style="list-style-type: none"> <li>Raw/Unprocessed Products</li> <li>Lightly Processed (chopped, frozen)</li> <li>High Value-Added: Pre-Cooked or Processed</li> </ol> </li> <li><b>Options for Processing Raw Products Off-farm</b> <ol style="list-style-type: none"> <li>Regional Processing Kitchens</li> <li>Timing</li> <li>Investing in Infrastructure for Minimal Processing</li> </ol> </li> <li><b>Financing Your Value-Added Products</b></li> <li><b>Considering Costs and Pricing</b></li> </ol>	<b>Slide Deck (slides 17-37)</b> <b>Suggested Activity:</b> (10 minutes) Producers work in a group or individually on the Product Planning Chart. <b>Materials:</b> <ul style="list-style-type: none"> <li>Worksheet 3A: Product Planning Chart</li> <li>Video—Partnerships Yielding Healthy Food In Oregon Schools: Umi Organics and Camas Country Mill (Lola Milholland, Umi Organics and Tom Hunton, Camas Country Mill)</li> </ul>

## Module 3: Background Information for Facilitators

### Core Concepts

- School infrastructure dictates the types of products a school will buy.
- The availability of infrastructure, labor, and storage capacity will help producers understand if they need to think about providing some level of processing for school sales.
- Pricing and profit margin play a role in a producer's decision to sell to schools or through a distributor.

### Digging Deeper

- [USDA School Food Buying Guide](#), USDA Food and Nutrition Service
- [Farm to School Local Processed Price Guide](#), Washington State Department of Agriculture

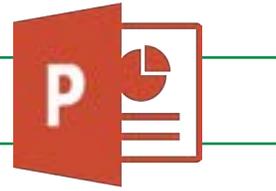
### Bringing the Farm to School Case Studies

- School Capacity and Product Development
  - **Video and Written Case Study:** Purchasing from Farmers: A Child Nutrition Director's Perspective (Fayetteville, AR School District)
- Product Development
  - **Video:** Partnerships Yielding Healthy Food In Oregon Schools: Umi Organics and Camas Country Mill (Lola Milholland, Umi Organics, and Tom Hunton, Camas Country Mill)

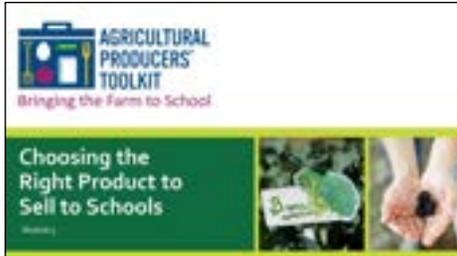
## Key Terms

- Value-added
- Price point
- Break-even price

- Download slide deck [here](#)

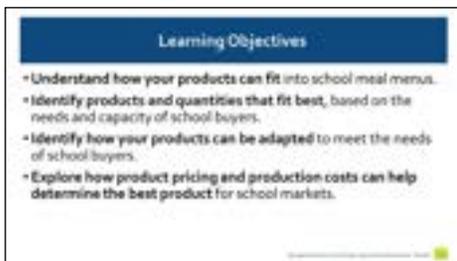


## Module 3: Introduction



### Slide 1: Choosing the Right Product to Sell (Title Slide)

*Facilitator prompt: Explain to producers that you are moving on to product development. In this section, producers will learn how to assess which of their current products fit into school menus, and how to identify the types and amounts of products that a school might purchase, building on the previous modules.*



### Slide 2: Learning Objectives

- Producers understand how their products can fit into school menus.
- Producers identify products and quantities that fit best, based on the needs and capacity of school buyers.
- Producers identify how their products can be adapted to meet the needs of school buyers.
- Producers explore how product pricing and production costs can help determine the best product for school markets.

## Section A: Choosing The Right product – School Considerations



### Slide 3: Section A: Choosing the Right Product – School Considerations (Section header)



### Slide 4: Choosing the Right Product

#### [Talking Points]

As discussed in Module 2, meeting with the School Nutrition Director can help you identify the types of products that schools are most likely to purchase and understand their volume requirements. We will dig into this a bit more in this section, so that you can hone in on the products that meet the needs of most School Buyers. We want to give you tools to answer these important questions:

- Can the schools within the district cook food from scratch?
- Do they have a central kitchen?
- Which of your current products could go in the menu?
- How can you find out if you meet the potential volume needs of the schools in the community?

*Facilitator prompt: Understand that some producers may approach this section differently, by already having a product in mind when deciding on moving forward with school sales. Be sure to acknowledge that in your introduction.*

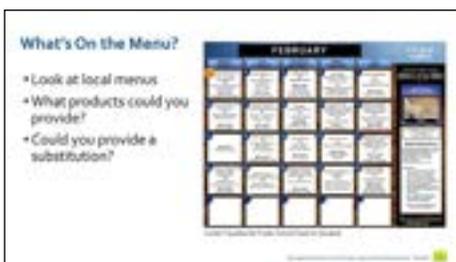


## Slide 5: What to Grow?

### [Talking Points]

- After the previous module, you should have an idea about how your product can reach a school market.
  - *Who in the room is planning to sell direct to schools through a Child Nutrition Program?*
  - *Who is considering selling through a distributor?*
- Keep in mind that school buyers are like any type of customer. They have preferences and specific types of products that will work best for them.
- In the same way you think of the best product mix for selling to restaurants or at a farmers market, you'll have to identify specific products that work best for a School Nutrition Director or a distributor. Communication is key to identify the best fit for your farm and your buyer.
- In addition, consider products that have lower costs of production. That's what we will be talking about in this module: the types of products that fit with the channel or channels that you selected and identifying the best product, based on your current infrastructure, the school's needs, and farm goals.
  - *Who has a product in mind at this time? Are you willing to share how you came to this decision?*

*Facilitator prompt: Tie in the previous section on selling to schools and the channels that producers can choose. Producers will need to get an understanding of school menus, schools' capacity and infrastructure for cooking raw or unprocessed products, and the types of products that work best for schools' infrastructure. Ask producers: Which school market channel seems the best fit for your farm or business operation. Why? Do you already have a product in mind that you'd like to sell to schools? How did you come to this decision?*



## Slide 6: What's on the Menu?

*Regionalization tip: Find a local school menu to share as part of this slide or print one off and hand it out to participants. This will help prompt the discussion points below. Many school menus are posted on school districts' websites.*

### [Talking Points]

- After looking at the school's menu, talking to the School Nutrition Director, or reviewing solicitations, you will have an idea of what types of products schools purchase. By communicating with the school buyer, you will understand if your product is a good fit and also how much of each product they buy.
- Schools often substitute items. So, after reviewing the menu, consider which of your products can be used to swap with a non-seasonal or traditional product.
  - *Schools typically prefer to substitute an item on their menu directly with a local version. For example, why might a school prefer to substitute an apple with a local apple vs. substituting an apple for canned peaches?*

*Facilitator prompt: It is important to stress here that, even if farmers have a product in mind, producers need to communicate with the School Nutrition Director or their distributor and keep an eye out for solicitations. Mention that producers should always have a market in mind and secured before entering the production phase. Selling to schools is no different.*



**Slide 7: Identifying Volume of the Product Based on the School's Needs**  
**[Talking points]**

- Let's talk about how you can get an idea of a school's volume requirements. Looking at menus is a good place to start. You can find these menus at the school district website. Menus are sometimes posted as much as six months in advance.
- Meet with the School Nutrition Director to find out how many meals/ servings of a product are needed and how that translates into pounds of product. Based on this information, you can start to determine if you can satisfy their volume requirements.
- Don't be discouraged by volume! Ask the director if there are programs or opportunities, such as salad bars, that do not require the level of volume needed to supply a school breakfast or lunch every day.
  - Larger districts may buy for, or test product with, select groups of schools.
  - Salad bars are a good example, but these may not be used anymore in light of the pandemic.
  - Specialized educational programs may also require a smaller volume.
  - Also consider smaller school districts or early childcare centers.
  - You could also partner with other producers to aggregate and meet volume needs.
- Note that if you're working with a distributor, they have gone through this process already and will tell you the volume and product mix they are looking for.

*Facilitator prompt: Modules 1 and 2 provided a high-level overview of volume and menu planning from the school perspective. To get an idea about volume requirements, producers can start by viewing the size of the school and its menu. Sometimes the volume requirement will be on the solicitation. Producers may want to have a basic understanding of the volume requirements for their product before meeting with school buyers.*



**Slide 8: Rethinking Volume Requirements**  
**[Talking Points]**

- Volume might seem overwhelming at first, but breaking down product requirements in the following ways can help the producer with production planning (discussed in the next module).
  - Delivery frequency will depend on the school's infrastructure and the product. It is recommended to have discussions about delivery expectations prior to solicitations being drafted. Producers and food service may have widely different expectations for delivery and may need to find ways to compromise.
  - You will also need to consider district size, how many student meals are served, and the type of serving (e.g., breakfast, lunch, snack).

*Facilitator prompt: Producers may need to rethink volume and frequency of school deliveries compared to other market channels. It might be more helpful to translate from pounds to meals/servings, so quantities are not overwhelming. Discuss how the requirements can be broken down by the portion size in the chart. Refer to table and discussion of broccoli for different school district sizes from Module 1 (in the [Producer Workbook](#)). The charts From USDA FNS Food Buying Guide will help illustrate these points.*



### Slide 9: School Cooking Infrastructure

#### [Talking Points]

- Module 1 discussed different school kitchen scenarios, such as central kitchen, fully equipped kitchen, and heat-and-serve.
- It is important to understand that this infrastructure will ultimately dictate what schools are able to cook and whether your product may need further processing before it reaches them.

*Facilitator prompt: Producers will need to have an understanding of schools' capacity and infrastructure for cooking raw or unprocessed products and the types of products that work best for a school's infrastructure.*



### Slide 10: School Cooking Infrastructure

#### [Talking Points]

- Here is an example of a “Heat-and-Serve” setup as described in Module 1.
  - Ask: Which types of local products would work with this type of infrastructure?
    - Answers: burger patties, carrot coins



### Slide 11: School Cooking Infrastructure

#### [Talking Points]

- Here is an example of a kitchen that is set up for scratch or speed-scratch cooking.
  - Ask: What types of local products might fit with this type of infrastructure?
    - Answers: chicken cutlets, whole carrots, meatballs



### Slide 12: School Cooking Infrastructure

#### [Talking Points]

- Salad bars provide options for smaller purchases and different products. Cafeterias have more flexibility with what they process and put on a salad bar than with a regular menu item.
  - Salad bars are becoming more and more common in cafeterias—even in schools without full-service kitchens—offering a great opportunity for produce farmers.
  - However, due to the COVID-19 pandemic, self-serve set-ups such as salad bars are discouraged. Schools will likely discontinue the use of self-serve salad bars until the pandemic is under control.
  - Ask: What types of products can work in a salad bar? Not just fruit and vegetables! Also ask, if the school has discontinued salad bars, how it is ensuring kids get raw vegetables. Are they offering carrot sticks in a sack lunch, for example?

**School's Food Needs – How Often**

- Determine how often the schools need a product
- Depends on crop/product and storage capacity
- Affects crop planning and succession planting



### Slide 13: School's Food Needs – How Often

#### [Talking Points]

- In addition to how much of a product is needed, you also need to determine how often the school food service director will want product. This will be communicated in the agreement with your buyer. Examples of things to ask and consider include:
  - Are carrots on the menu every week?
  - Are sweet potatoes served once a month?
  - Does the school have freezer capacity to store all of your hamburger for six months?
- Knowing the required volume and frequency can help you with crop planning and succession planting to meet those needs. Knowing and considering the storage capacity of the school district, you might be able to provide certain one-time-harvest products all at once. We will be working through crop and livestock planning in the next module.

*Facilitator prompt: Many producers will be aware of continuous-harvest versus one-time-harvest products. Some products can be delivered all at once if the school has storage capacity. This can be the case with meat or with produce storage crops.*

**Just Getting Started?**

- Micro purchases
- Special meals/events
  - Harvest of the Month
  - National Farm to School Month activities
  - Taste tests
  - Classroom lessons



### Slide 14: Just getting started?

*Regionalization tip: Provide farm to school contact lists as written materials or introduce producers to farm to school contacts in your region to assist farmers in building relationships.*

#### [Talking Points]

Special meals and school events, such as a featured local meal, Harvest of the Month, National Farm to School Month activities (October), taste tests, and classroom lessons, are great small-scale opportunities to get started with school sales.

The previous module mentioned some unique models of schools and producers building relationships based on a need or educational opportunity. Some of these special events might not be coordinated through the School Food Authority, so you might instead be able to work with a teacher or farm to school contact who is planning the activity.

- Check school district websites for a calendar of events and contact information.

Also, consider starting small and growing this side of your farm business. As with any market channel, it will evolve as the relationships evolve. This may require scaling up your enterprise. This will be discussed in Module 4.

*Facilitator prompt: Explain school food program options for producers who are just getting started and do not feel like their product can fit into a solicitation for weekly or monthly supply. They can consider working with a school for micro-purchases or for a school program such as Harvest of the Month or a Local Food Day during National Farm to School Month (October).*



### Slide 15: Purchasing from Farmers: A Child Nutrition Director's Perspective; Fayetteville Public Schools

- Let's hear from a School Nutrition Director in Fayetteville, Arkansas, about their approach to working with farmers on product development, based on their cooking infrastructure.

*Facilitator prompt:* Click on embedded link to show approximately 2-minute video excerpt. Encourage participants to read more about this in the written case study "Purchasing from Farmers: A Child Nutrition Director's Perspective; Fayetteville Public Schools" on the [Bringing the Farm to School Case Studies](#) page.



### Slide 16: Applied Activity - School Menu Brainstorm

*Activity objective:* Producers will identify which of their products could be substituted in the school meal program, based on the menu.

- Hand out Sample School Menus (or look them up online): Instruct producers to look at sample school menus and brainstorm what products could be local, and/or have producers brainstorm what they might offer a school based on a given equipment, labor, and logistical setup of the school. Prompt with these questions:
  - Which of your products fit into a salad bar? (Note: not just fruit and vegetables)
  - What is easiest for schools to prepare?
  - Create a volume scenario based on the table from "Rethinking Volume"
  - How can your product availability fit with the school-year timeline?

*Facilitator prompt:* Plan 10-15 minutes for this activity. Explain school food program options for producers who are just getting started and do not feel like their product can fit into a solicitation for weekly or monthly supply. They can consider working with a school for micro-purchases or for a school program such as Harvest of the Month or a Local Food Day during National Farm to School Month (October).



## Section B: Product Development

### Slide 17: Section B: Product Development (Section header)

In this section, producers will learn how to assess value-added options that work with their farms, and will understand options for off-farm processing, if the school infrastructure requires that.



### Slide 18: What Range of Products Work with the School District You Are Trying to Sell to?

#### [Talking Points]

In addition to knowing what products, when, and how much your school needs, you also need to consider if they require some level of processing.

- Minimal processing may make the difference between whether a school buys a local item or sources it from a broadline distributor. And, it might be easy to implement on your farm!

- In this section, we will go through the different levels of processing and discuss different farm and community-based strategies for meeting those requirements.

**Facilitator prompt:** Ask producers to recall the limitations in school capacity discussed in this and the previous modules. Ask them how this might affect the need to provide some level of processing. These logistical and capacity considerations should be named:

- Equipment: does the school have a full kitchen?
- Prep time (labor)
- Student population



## Slide 19: Raw/Unprocessed Products

**Regionalization tip:** Use a local or regional school profile.

### [Talking Points]

Consider the characteristics of the school’s labor and equipment.

- How much prep time does the staff have? How willing are they to use raw foods from your farm?
- Which products could be sold raw?
- What are the possibilities of introducing new items?

**Facilitator prompt:** Have producers pull out their school menus for this slide. Ask producers to identify what types of schools will be able to use raw/unprocessed products. Consider using the following resource to prompt discussion: [Washington Schools Most Frequently Purchased Fruits & Vegetables](#) (list of most-purchased raw, minimally processed, and processed fruits and vegetables in Washington).



## Slide 20: Lightly Processed Vegetables and Fruit (Chopped, Pitted)

### [Talking Points]

When you do research and start communicating with schools, investigate which have labor and facilities for doing minimal preparation, such as combining, chopping, steaming, or baking.

- This will be apparent in the bidding process and as you communicate and develop a relationship with the School Food Authority.

If the school doesn’t have capabilities, then consider farm-based processing, community kitchens, or aggregators that process.

- Ask: What can be processed on-farm and what requires further infrastructure?
- Carrots, broccoli, squash, and potatoes can be cut on the farm.
- Minimal processing works well for farms that have rudimentary facilities that are in compliance with regulations (GAP certification if required by the school, and/or FSMA). Processed products need adequate packaging.

**Facilitator prompt:** Consider using the following resource to prompt discussion: [Washington Schools Top 10 Most Frequently Purchased Minimally Processed Fruits & Vegetables](#) (Minimally processed fruits and vegetables most frequently purchased for school meals in the 2009-2010 school year in Washington). Ask: “Which schools does this work for?”



## Slide 21: Processed Meats (Patties, Partially Cut Products)

*Regionalization tip: Identify if your state has state-inspected meat processing or only USDA inspection.*

### [Talking Points]

Meat will always require a state- or USDA-inspected facility. You can work with schools to identify the types of cuts that will work for the school district and specify these to your processor. For example, one-inch cubed kabob meat or ground patties.

*Facilitator prompt: Livestock will be processed at a USDA-inspected or state-inspected facility. At that point, it can be cut to the school's specifications. Before the training, identify the state regulations on meat processing or find a resource to give to meat producers. This might be a great time to invite a guest speaker. Visit [FSIS State Inspection and Cooperative Agreements](#) to find Meat Processing and Inspection Programs.*



## Slide 22: High Value-Added: Pre-Cooked or Frozen

*Regionalization tip: Provide examples of local or regional value-added products. How do these match up with the USDA Food program?*

### [Talking Points]

Pre-cooked fruits, vegetables, and meat will require extensive infrastructure in order for schools to use them.

- This is probably best left to a processing kitchen if the infrastructure doesn't already exist on your farm or in your business operation. If your farm is interested in value-added elements to help you sell to a school, a USDA Farm to School grant (or other grants) can assist in purchasing equipment for value-added products. More information for these grants is in the "Digging Deeper" section of Module 3 in your workbook.

Proteins such as ground beef (delivered frozen in small packages; five pounds works well for many schools) work very well where kitchens prepare various beef dishes on-site.

- Beef can easily be incorporated into the menu if the farmer has the processing infrastructure, experience, or access to an existing processor relationship. (State vs. USDA slaughter facilities will be covered in Module 4.)

Frozen berries, pitted cherries, and frozen and peeled squash are all great examples of processed foods that can be used in school meal programs.

If you plan to develop a value-added product, there are many resources to help. Many Cooperative Extension Services or Food Innovation labs will test recipes and will make sure your products are processed appropriately and safely, and that they meet regulations.

If you develop value-added products for schools, they could have broad appeal to other institutional markets. For example, hospitals have low-sodium goals similar to schools.

*Regionalization tip: Include state or regional examples of value-added processing and financing. These products will vary greatly from state to state. Producers will likely have questions about processing rules and regulations.*

*Facilitator prompt: Consider that value-added products may be difficult in some school settings because of their higher cost and because processed USDA foods are more readily available.*



### Slide 23: Options for Processing Raw Products Off-farm

*Regionalization tip: Feature Farm to School grantees that have utilized grants to collaborate with producers for processing off-farm. It is even better if you are able to identify one in your state!*

#### [Talking Points]

Don't feel like going all-in on processing? Consider whether there is a food hub or aggregator in your region that can do processing. They often have the resources to acquire processing equipment through different grants (USDA farm to school grant, for example).

*Facilitator prompt: Review the market channels discussed in Module 2. Mention that some of these channels will have processing capabilities, so those may be a better channel to choose if some level of processing is required by the district.*



### Slide 24: Adding Value without Processing

#### [Talking Points]

There are additional benefits or values that your local products have, without processing. Providing extremely fresh, superior products can make your products more valuable to a school than a product from a distributor. You can also add value in other ways such as offering field trips to your farm or participating in school events or teachers' lessons. These values should be shared with the School Food Authority as you are establishing a relationship with them.

- What are other ways you can add value to your products?



### Slide 25: Regional Processing Kitchens

*Regionalization tip: Options or examples in your state or region would be great to mention here. This sample list will help to customize the slide. Ask producers to identify products that would fit on the plate based on this equipment.*

- Auger filler and ribbon blender for dry products
- Cherry pitter
- Industrial chopper/dicer, fruit and vegetable peeler
- 30- and 90-gallon steam and water jacketed kettles
- USDA meat room smokers, meat grinders, and vacuum tumblers
- Commercial bottling fillers
- Vacuum packaging machines
- Freezer, cooler, and dry-storage rental
- Loading dock and forklift
- Retail/commissary kitchen
- VEMAG stuffers and portioner with guillotine attachments

#### [Talking Points]

Regional processing or community kitchens can be a great option if preparing your product requires a licensed and inspected kitchen. Renting space at a regional processing center will usually be charged by the hour, and costs will depend on what you are using.

- What are some examples of school products that you could use this equipment for?
- What is the final product on the school plate?
- Some communities have free processing kitchens as an economic development opportunity. Be sure to explore all your options.

*Facilitator prompt: Regional processing kitchens are licensed and inspected. The space and equipment are rented by a farmer or, even better, product is aggregated and processed through a food hub.*



### Slide 26: Timing

#### [Talking Points]

When schools and producers agree on a processed product, it is important to consider timing. Both the producer and the school will need to factor in enough time from ordering to delivery and need to create a timeline that is acceptable to both. The timeline should include these stages:

- Harvest and delivery to processor
- Processing logistics
- School delivery

*Facilitator prompt: Play Producer Spotlight Video with Glyen Holmes talking about timing and processing products.*



### Slide 27: Consider the Full Costs of Processing your Product

#### [Talking Points]

There are additional costs beyond just processing-facility rental fees. It's important to include these costs in your product enterprise budgeting.

- Opportunity costs—With shared facilities, you may have to wait to get a product processed
- Food hubs and cooperatives require producer contribution and meeting attendance
- Transportation to and from the facility
- Time at the facility and cleanup afterwards
- Processing facilities may have existing labor. Labor and staffing may have to be accounted for.
- Storage (freezer, dry, or refrigerated) rental prices

*Facilitator prompt: Any type of processing is going to add cost to a producer's bottom line and ultimately increase the price of the product you sell to the school district.*



### Slide 28: Financing Your Value-Added Products

*Regionalization tip: Consider finding an example of a producer in your region who has utilized this funding to start or expand farm to school sales.*

#### [Talking Points]

This graphic outlines the many grants and low-interest loans that USDA offers for farm to school activities. There are different programs for different types of entities. The following slide lists the grants/loans specifically for farmers and ranchers.

Both grant and loan programs will require a carefully thought-out business plan and budget, which will be discussed in the next section. There will also be further discussion of grant programs in the conclusion of this training. On your screen, and in your workbook, is a list of grant and loan programs that specifically apply to value-added products.

- Grants:
  - Value-Added Producer Grant is a federal program through USDA Rural Development
  - Specialty Crop Block Grant
  - Farm to School Grants – The FNS Farm to School Grants can help both schools AND FARMS with infrastructure
- Low-interest loans:
  - KIVA is an alternative, interest-free, crowd-funded financing initiative for loans up to \$10,000. Pull up the KIVA website.
- Farm Service Agency provides low-interest Microloans of less than \$50,000, as well as Farm Storage Facility Loans. Visit the Farm Service Agency’s [Farm Loan Programs](#) website.

*Facilitator prompt: Review the grant programs on this slide before the training. Some are more oriented to nonprofits and community organizations, and others are more suitable for producers.*



**Slide 29: Producer Spotlight: Umi Organics and Camas Country Mill**  
*[Talking points]*

Now let’s see how farmers and processors have worked together to create a product that meets the nutrition needs of the school district in the Oregon Public Schools

*Facilitator prompt: Click on embedded link to show 4-minute video. Encourage participants to go to the [Bringing the Farm to School Case Studies](#) page for more information and case studies.*



**Slide 30: Applied Activity: Give a Values Pitch to Your Neighbor**

*Activity objective: Producers will give some thought to, and articulate, the value their products bring to school meals.*

*Facilitator prompt: Plan about 10 minutes for this activity.*

- Instructions are on your slide.
- What makes your product “valuable”?



**Slide 31: Farm to School – Not a High Profit Margin**

*Facilitator prompt: Show the Montana Beef to School video, [Mannix Beef and Lower Valley Meat Processing](#). Ask participants “Where were the areas where these producers added value? How do you think they were able to facilitate the price conversation?”*



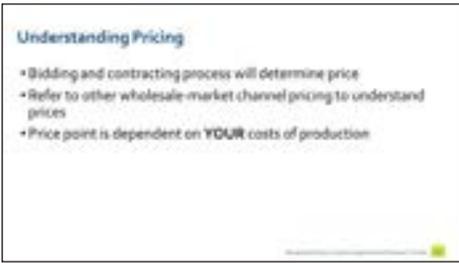
### Slide 32: Farm to School – Not a High Profit Margin

#### [Talking Points]

Farm to School may not have a high profit margin, but consider it more of a reliable sale for products that don't cost you a lot of money to produce.

- Assume that a farm to school supply chain has the ability to work creatively with local producers, and working with your district school food service director/contact can help you better understand where they are willing to substitute a local product.
- Selling some higher-cost items into the Fresh Fruit and Vegetable Program or as taste tests can encourage students to try more higher-profit-margin items that can be sold in bulk to the meal programs.
- High volumes, seconds, or product varieties that have lower costs of production could be creative approaches to finding the right product for the school market and still allowing for a small profit.
- Having an understanding of which products have a lower cost of production will be a good start in identifying products that are good fit for school markets.
- Let's brainstorm which products might be a good fit, based on these considerations:
  - Volume
  - Seconds
  - Products with lower production costs

*Facilitator prompt: Provide examples of products that might have lower production costs (e.g., winter squash, cheap cuts of meat).*



### Slide 33: Understanding Pricing

#### [Talking Points]

Most Child Nutrition Programs require a solicitation process. Because of this, price doesn't have much flexibility. Producers set the price based on the solicitation, with quotes or proposals. After a contract is in place, the price will not be flexible.

To understand and compare pricing when responding to solicitations, refer to other wholesale-market-channel pricing to get a baseline understanding. Here are a few places you can research wholesale pricing for a point of comparison.

- USDA AMS Wholesale Pricing guides
- Other wholesale markets: hospitals, restaurants

Price point is important, but your price must cover your costs of production, processing, and harvesting and provide a profit margin if it is to be a good fit for both the school meal program and your farm.

*Facilitator prompt: Tie in Module 2 content on procurement and explain that solicitations usually don't include the price. The producer includes their price in the bid. Producers can work with schools ahead of solicitations (through market research), to ensure that their product will meet the school needs at the price point that works for them.*



## Slide 34: Understanding Pricing

### [Talking Points]

- It may not make financial sense for your complete product line to enter into a school market. As you consider which products are a good fit to sell at the school, keep in mind the wholesale price that schools are able to pay.
- Compare your break-even price with what the school can pay. You can determine these prices by looking at past bids, looking at a price sheet from a distributor, and talking to the School Nutrition Director. This will be discussed further in Module 4.
- Keep in mind that the Food Service Director is looking at the whole plate, not the cost per item. They may be able to pay more for a local item on that plate.
- Ask if they have programs that can pay more for a local product. Or, if it is for a special event or classroom lesson, they might have outside funds that can afford a higher price.



## Slide 35: Applied Activity: Chart Your Product Development

*Activity objective: Encourage producers to write down critical steps and considerations in a product-development process.*

*Facilitator prompt: Have producers use [Worksheet 3A: Product Planning Chart](#) from their [Producer Workbook](#) to complete the activity.*

### [Talking Points]

Turn to the Product Development Chart in your *Producer Workbook*. Use [Worksheet 3A: Chart Your Product Development](#) to complete the activity.



## Slide 36: Action Planning: Let's Check In!

- List the products I produce now, or could start producing, that might be good to sell to schools.
- I understand how these products could be processed to meet school demand.
- I understand the tools I can use to price these products.

*Facilitator prompt: Once this is done, ask producers to flip to the [School Business Action Planning Guide](#) in Appendix A of their workbooks. Prompt producers to think about their next steps to get their product to schools. Be sure to encourage them to check in with the question prompts from this Module, also listed above.*

*Depending on your overall training schedule, this may be a good time to take a break.*

# MODULE 4: GROWING FOR SCHOOLS

## About Module 4

Producers who want to engage in school markets need to understand how these markets will affect their business plans and production costs. This module is heavily focused on business and production planning to meet school requirements and the product mix identified in previous modules.

### Important Considerations for Module 4:

- Review the farm products that producers identified in Module 3 and help producers develop an understanding of what the break-even point is for the products they are considering selling to schools.
- Help producers develop a production plan for the products they identified in Module 3, from field to delivery. This includes field production, succession planning, post-harvest treatment, packaging, and delivery.
- Note that this module is heavy on applied activities. The presenter’s portion is kept to a minimum, while producers spend time on the worksheets in the *Producer Workbook*, developing production plans, and identifying areas that need more work in order to access school markets.
- If possible, encourage participants to bring relevant information about their business, and even their business plan, to the training so they can get the most out of this exercise.
- If you are not comfortable teaching some of the topics discussed in this module, consider inviting speakers from the Small Business Administration (SBA), producer organizations, Extension, and/or Farm Credit.

## MODULE 4: GROWING FOR SCHOOLS

Estimated Time: 2.5 hours

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>A. Business Planning</b> Duration: 20 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>• Know how to determine if selling to schools is right for them, through Whole-Farm Planning decision making</li> <li>• Understand and be familiar with tools that can help them determine if the school price point works for the products they have identified for school markets</li> </ul>	<ol style="list-style-type: none"> <li>1. Review Farm Goals and Farm to School Sales</li> <li>2. Are you Ready?</li> <li>3. Understanding Your Break-even Point</li> <li>4. Using Enterprise Budgets to Determine Break-even Price</li> <li>5. Return on Investment</li> <li>6. Cost Calculators</li> </ol>	<b>Slide Deck (slides 1-10)</b>  <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>• Producers work in groups to outline (15 minutes) enterprise and break-even price point for products they will be selling to schools. (Group by vegetable and livestock); or</li> <li>• Producers work alone on Worksheet 4A</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>• Case study: Is Farm to School Right for You; Cattail Organics</li> <li>• Worksheet: 4A Business Planning Considerations for School Sales—Break-even Price and Return on Investment</li> </ul>
<b>B. Scaling Up Production- Meeting Increased Demand For School Markets</b> Duration: 30 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>• Understand the functional farm logistics of increasing production to meet increased demand.</li> <li>• Examine the appropriate scale, workload, equipment, land needs, and regulatory aspects needed to scale a farm to higher production</li> <li>• Understand the scale and efficiency standards within farm management systems in order to meet school buyer requirements</li> <li>• Evaluate the finances and marketing characteristics of a successfully scaled-up farm</li> </ul>	<ol style="list-style-type: none"> <li>1. Understanding Scales of Production</li> <li>2. Sustainable Growth</li> <li>3. Labor</li> <li>4. Selling to Schools – Special Considerations</li> <li>5. Meeting the Budget Needs of Schools</li> <li>6. Meeting School Grading, Packaging, and Labeling Requirements</li> <li>7. Food Safety</li> <li>8. Managing Risks with Insurance</li> </ol>	<b>Slide Deck (slides 10-23)</b>  <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>• Group discussion: What is your farm's weakest link? (5 minutes)</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>• Worksheets: 4B Scaling Up Production for School Markets—Weakest Link and Strategies for Improvement</li> </ul>
<b>C. Crop Production and Planning</b> Duration: 30 minutes.	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>• Understand the elements of successful crop planning to meet school demand</li> <li>• Demonstrate crop planning based on demand, yield projections, and production goals</li> <li>• Assess planting schedules for sustained harvest</li> </ul>	<ol style="list-style-type: none"> <li>1. Planning and Goals</li> <li>2. Planting Plan</li> <li>3. Crop Planning: It is not a perfect world</li> <li>4. Record Keeping and profitability</li> </ol>	<b>Slide Deck (slides 24-29)</b>  <b>Suggested Activities (15 minutes):</b> <ul style="list-style-type: none"> <li>• Crop planning exercise (Break off into groups depending on make-up of producer audience):  <b>VEGETABLE:</b> <ul style="list-style-type: none"> <li>— Calculate plot size (rows, row size) for scaling up production from 1000 sq ft to 1 acre based on anticipated yield</li> </ul> <b>GRAINS/ROW CROPS:</b> <ul style="list-style-type: none"> <li>— Assess acreage needed, seeding rate, yield, and profitability for grain/ pulse crops sold through an intermediary for school procurement</li> </ul> </li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>• Worksheets: Worksheet 4C: Planning Crop Production from a Bid Sheet Supplement- Online Excel based planning exercise</li> <li>• Video: Succession Planting and Season Extension for School Sales: Living Root Farm, Hardin, MT</li> <li>• Written Case Study: Season Extension for School Sales: Living Root Farm, Hardin, MT</li> </ul>

## MODULE 4: GROWING FOR SCHOOLS (CONTINUED)

Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<p><b>D. Livestock Production Planning</b></p> <p>Duration: 30 minutes</p>	<p>In this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Understand school needs for meat, dairy, and egg production</li> <li>• Understand livestock planning based on demand, yield projections, and production goals</li> <li>• Assess schedules for sustained delivery and profitability</li> </ul>	<ol style="list-style-type: none"> <li>1. How do Livestock Products Fit on the Plate</li> <li>2. How do your products fit with school demands?</li> <li>3. Determine School needs</li> <li>4. Assess Current Production</li> <li>5. Plan Production Based on Demand</li> <li>6. Eggs (special considerations)</li> </ol>	<p><b>Slide Deck (slides 30-38)</b></p> <p><b>Suggested Activities (15 minutes):</b></p> <ul style="list-style-type: none"> <li>• Livestock planning exercise (Break off into groups depending on make-up of producer audience):</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Worksheet 4D: Livestock Production and Planning—Capacity and Product Assessment</li> <li>• Podcast: Karla Buck with Bear Paw Meats</li> <li>• Written Case Study: Beef to School—Case Study of Bear Paw Meats</li> </ul>
<p><b>E. Navigating Food Safety Standards When Selling to Schools.</b></p> <p>Duration: 25 minutes</p>	<p>In this session, producers will be able to:</p> <ul style="list-style-type: none"> <li>• Determine food safety requirements of area schools and work with them if the School Food Authority is not clear on the school's standards</li> <li>• Assess food safety next steps, based on the school's or other channel's food safety requirements</li> </ul>	<ol style="list-style-type: none"> <li>1. Myth busting: Food safety requirements in schools</li> <li>2. Finding Food Safety Requirements of School Food Authority</li> <li>3. Meat Processing and Food Safety</li> </ol>	<p><b>Slide Deck (slides 36-48)</b></p> <p><b>Suggested Activities (10 minutes): Break out by livestock or crops.</b></p> <ul style="list-style-type: none"> <li>• Discussion topic: communicating with school markets about food safety</li> <li>• If there is time, do a role-playing exercise where producers communicate with the SFA about their food safety practices</li> </ul> <p><b>Materials:</b></p> <ul style="list-style-type: none"> <li>• Video: Mythbusting: Common Ground Farm—Working with schools to meet food safety expectations without GAP certification</li> <li>• Worksheet 4E: Communicating your Food Safety Protocols to School Food Authorities—Risk Assessment</li> <li>• Case Study: Common Ground Farm—Working with schools to meet food safety expectations without GAP certification</li> </ul>

## Module 4: Background For Facilitators

### Core Concepts

- Business planning principles
- Break-even analysis and enterprise budgeting
- Production planning principles
- Basic food safety standards

### Digging Deeper

- [Estimating Breakeven Sales for Your Small Business](#), Purdue University
- [Quality of Life: Tools and Systems for a Healthy Farming Partnership](#), Atina Diffley
- [Grades and Standards](#), USDA Agricultural Marketing Service
- [Noninsured Crop Disaster Assistance Program and Whole-Farm Revenue Protection: Understanding the Differences](#), National Center for Appropriate Technology
- [Crop Planning for Vegetable Growers](#), National Center for Appropriate Technology
- [Farm to School Sales: Profiles of Ranches Making it Work](#), National Center for Appropriate Technology
- [Montana Beef to School Resources](#), Montana Farm to School
- [States Operating their Own MPI Programs](#), USDA Food Safety and Inspection Service
- [Local Meat in Schools - Increasing Opportunities for Small and Mid-Sized Livestock Ranchers and Fishermen](#), USDA Food and Nutrition Service, Office of Community Food Systems
- [Produce Safety Alliance](#), Cornell University
- [Good Agricultural Practices](#), Certification Basics, Utah State University Extension
- [The Seven Principles of HACCP](#), University of Nebraska Lincoln

### Bringing the Farm to School Case Studies

- **Written Case Study:** Is Farm to School Right for You (Katrina Becker, Cattail Organics; Athens, Wisconsin)
- **Podcast and Written Case Study:** Beef to School: Bear Paw Meats (Karla Buck; Chinook, Montana)
- **Video:** Communicating Food Safety Practices with your Buyers (Common Ground Farm; Wappingers Falls, NY)
- **Video:** Season Extension and Succession Planning for School Sales (Living Root Farm; Hardin, MT)

## Key Terms

Price point

Break Even

GAP

HACCP

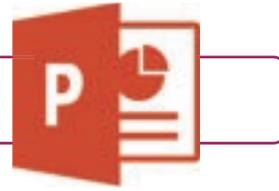
FSMA

Return on Investment

Enterprise budget

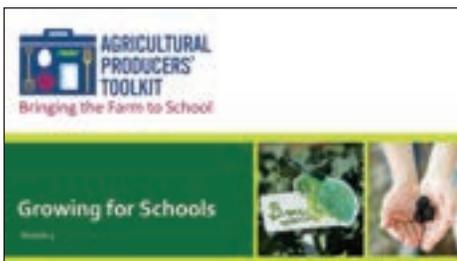
Buy American and the Agriculture Improvement Act of 2018

- Download slide deck [here](#)



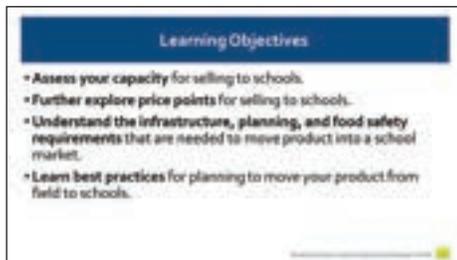
**Facilitator prompt:** Trainers can pick and choose module content based on producer type. For example, the crop and livestock production planning sections can be excluded or included as necessary—or only include examples for that audience. Also, consider creating a whole training on these topics if there is need and desire to dig deeper into a topic area. Bringing Extension and producer organizations onto your team can help in providing examples that apply to your state (and can help with this section). Finally, a note on food safety: there is already a lot of information and producer training on food safety, so we have kept that section to a minimum, with just a basic overview of the different regulations and certifications related to this topic. If producers are still stumped on food safety, direct them to the food safety resources that are available in their state.

## Module 4: Introduction



### Slide 1: Module 4: Growing for Schools (Title Slide)

**Facilitator prompt:** Let producers know that this is the last module and we will shift from the marketing end to understanding how to move their product from field to market.



### Slide 2: Learning Objectives

#### [Talking Points]

In this module we will be digging into understanding your breakeven price for your products to ensure you can profitably sell to schools. This involves understanding your capacity and whether you will need to scale up to make school sales work for your farm. Schools can be a steady and reliable market. We will also start developing a production plan for those products. We will spend some time exploring your food safety risks and how to communicate your food safety practices with school food administrators.



### Slide 3: Applied Activity - Let's Play Jeopardy

#### Facilitator prompt:

- This is an optional activity to get producers familiar with the terminology in this module. Use the key terms from this module, the glossary, and instructions from [How to Create a PowerPoint Jeopardy Quiz](#) to create the activity. Participants will guess the proper term by saying "what is..."
- Plan 10-15 minutes for this activity.



## Section A: Business Planning for School Sales

### Slide 4: Section A: Business Planning For School Sales (Section Header)



### Slide 5: From Goals to Planning

#### [Talking Points]

At this point, you should have an idea about whether or not school sales match with your goals and farm plan and which product will work. You have also learned that several factors affect how a product fits into the school menu. These include market channel, school needs, and adaptation—such as lowering costs of production or using a lower grade or blemished product to meet the price point required by schools.

Here is a review of the marketing channels for selling to schools:

- Direct to school
- Intermediate markets, such as food hubs and aggregators
- Large national distributors
- USDA Foods or Department of Defense (DoD) Fresh

**Facilitator prompt:** *If producers are satisfied with the scale and lifestyle of a direct-farm-market business, accessing school markets is probably not for them. But the decision to sell to schools is not “all or nothing.” Many farms integrate elements of direct and wholesale/intermediated markets for a successful business plan. Crop planning is essentially matching production to the demand of the markets—in this case, the school market. Gauge the audience to see if their goals still align based on what they have learned so far.*

- What crops work for school sales, based on previous sessions?
- Identify top crops that have been easily and successfully sourced from local farmers and served in school meals.



### Slide 6: Price—Understanding Your Break-even Point

#### [Talking Points]

So, let’s dig further into how to determine if the price that school districts can pay will work with your break-even price point. The way to determine that is to understand how much your product costs to produce—also called production costs. Start with the fixed costs for your farm or business operation. What are some examples of fixed costs?

- As you can see from this table, the costs vary by type of market (and region). Why do you think labor is so much lower for farmers that are selling into standard wholesale markets?

Answers should include these costs:

- Mortgage
- Tractor payments (but will be depreciated)
- Utilities

What are some variable costs that would be unique to selling to schools?

Answers should include these costs:

- Fuel and transportation
- Seed
- Processing costs (livestock)
- Inputs
- Labor (Note to the audience that this may go down—especially if the farmer is already engaged in direct-market channels, which require more time.)

**Facilitator prompt:**

- Outline costs that are unique to school markets and that would need to be entered into a cost calculation – engage producers in what those costs might be
- Show table “Share of Variable Costs Attributed to the Top Six Expenditure Categories” on page 30 of the [NFSN Economic Impacts of Farm to School Report](#)
- Prompt producers in the audience to identify the fixed vs. variable costs
- Resource for understanding break-even point: [Estimating Breakeven Sales for Your Small Business](#), Purdue University



**Slide 7: How to Use an Enterprise Budget to Determine Break-even Price**

**[Talking Points]**

- Enterprise budgets are an important tool for determining costs of production and helping you understand your break-even price. They can be done on a ledger, as well as in Excel, QuickBooks, and a host of other software programs.
- The “break-even price” is the price that equals your cost of production. A pricing point above the break-even point will be needed to generate profit.
- It is important for you to understand the costs (including labor) of producing the enterprise/product that you are planning to sell to schools.
- It is also important to know that schools might be willing to work with producers to find ways to bring the costs of production down, so that you can get a better price point without sacrificing profits for the farm. For example, taking un-stickered, unwashed watermelons in giant bins vs. requiring stickers on each, full wash, and small cases.

**Facilitator prompt:** Most producers will understand what an enterprise budget is. Basic business planning and financial planning experience are expected when selling to schools.

- There are typically enterprise budget templates for most farm products. Do some research in your state and identify regional or local resources, because some of the expenses will vary by region. Show an enterprise budget (see *Digging Deeper* section in Appendix 1) on the screen. See the Center for Integrated Agricultural Systems UW-Madison’s [enterprise budget plans for farmers](#).
- Producers can estimate their income in an enterprise budget by using the AMS Wholesale Price Index in *Digging Deeper*.
- If you don’t feel comfortable with enterprise-budget discussions, consider utilizing an Extension or SBA representative for this portion of the discussion.

Looking for a case study? Consider: Alachua, Florida, Farm to School grantee. Their school district provides the local farmers with reusable bins for their products, to cut cost. They have also developed a Work Hub, which grows, aggregates, and processes locally grown foods for distribution to district schools. Or see the [Written Case Study on Cattail Organics on the Bringing the Farm to School Case Studies](#) page.



**Slide 8: Cost Calculators**

**[Talking Points]**

There are some free online calculators that you can use to develop a budget and analyze your costs for specific products. These include the [Oklahoma Farm to School Distribution Cost Template and Produce Calculator in Excel](#) and the [Veggie and Livestock Compass](#). Let’s now walk through some of the costs of a selected product and see where we wind up—in the red or in the black.

*Facilitator prompt: Have producers identify the product they are most interested in producing for a school market. Walk them through a cost calculator with this product. Be sure to review the calculators in this section prior to the session, for guidance. A fun exercise can be to have a hybrid product or mix of different products based on the audience; for example, creating a Bacon Lettuce Tomato enterprise.*



## Slide 9: Return on Investment

### [Talking Points]

- If a significant investment in infrastructure will be required to move your product into a school market, a return-on-investment calculation should be done.
- Think of equipment like a larger walk-in cooler, freezers, and packing-shed equipment for harvest and wash.
- Much of this type of equipment may be needed if shifting from direct markets to intermediated markets.
- Financing and some grant options are available. See Digging Deeper for more in-depth resources for financing.



## Slide 10: Producer Spotlight Podcast

Kat Becker from Cattail Organics Discusses Price Point. Discuss the importance of understanding the break-even point for the enterprise/product that will be sold to the school district.

*Facilitator prompt: Share an excerpt from the written case study, or one from your own region or state. found at [Bringing the Farm to School Case Studies](#) page. If there is time, discuss Katrina's strategy for pricing their products fairly and for a profit. Encourage participants to read more about Cattail Organics in the written case study "Is Farm to School Right for You?" on the [Bringing the Farm to School Case Studies](#) page.*



## Slide 11: Applied Activity: Enterprise and Return-on-Investment-Costs Evaluation

*Activity objective: Producers will start the process of determining if their production costs will be lower than the price schools are able to pay. Use [Worksheet 4A: Business Planning Considerations for School Sales—Break-even Price and Return on Investment](#), in the [Producer Workbook](#).*

### Facilitator prompt:

- Plan 15 minutes for this activity.
- Producers can work in groups to outline enterprise costs, with the goal of determining break-even costs, as well as understanding a school's requested volumes to determine the price you could offer. What infrastructure might you need for products you will be selling to schools?
- Producers identify next steps so that their break-even price will meet the school bidding-sheet specifications.

## Section B: Scaling Up Production—Meeting Increased Demand for School Markets

*Facilitator prompt: Depending on the audience and their interest, Sections B-D could be longer and used as a stand-alone presentation at a producer conference or an all-day session titled “Scaling up for School Markets,” or used as an in-depth online resource.*



### Slide 12: Scaling Up Production—Meeting Increased Demand for School Markets (Section Header)

#### [Talking Points]

For this section we want you to...

- Understand the functional farm logistics of increasing production to meet increased demand.
- Examine the appropriate scale, workload, equipment needs, land needs, and regulatory aspects of scaling a farm to higher production.
- Understand the scale and efficiency standards within farm-management systems in order to meet school buyer requirements.
- Evaluate the finances and marketing characteristics of a successfully scaled-up farm.



### Slide 13: Understanding Scales of Production

#### [Talking Points]

- If you are considering selling to schools, chances are that you already have experience in other types of market channels—presumably, direct markets. As farmers consider opportunities (and challenges) for selling to schools, they need to evaluate current and future scales of production and particular factors that make up different scales. Most importantly, the scale must represent a good fit for a producer’s management skills, land capabilities, and goals.

*Facilitator prompt: Review Farm to School Market Channels (Worksheet 2A from Module 2 in the Producer Workbook) and discuss how scale and efficiency might be different depending on the channel.*



### Slide 14: Heading in the Direction of Farm to School

#### [Talking Points]

- Selling to schools can be beneficial in helping farms and business operations work toward their goals, but it is not a marketing channel to take lightly. Reflect on the longer-term farm goals you identified in your action plan. Do those align with increasing production/ capacity/ or efficiency for school sales?
- Evaluating the past farming season is a good starting point when considering taking on school accounts as a new market. This process will allow for the identification of your "weakest link" that prevents the farm from meeting goals, as well as the numerous adverse factors that present challenges to the farm.
- “One, and only one, weakest link accounts for the strength of the entire chain, regardless of how strong other links might be. To strengthen a chain, one must always attend first to the weakest link. Other links (adverse factors), no matter how frail they appear, are essentially non-problems until the weakest link is first fixed.” Allan Savory

**Facilitator prompt:** Ask the group to spend some time thinking about and discussing the weak links on their farms. Be clear that each farm should only have one weak link that is holding it back, as all of the other challenges will be adverse factors that can't be addressed until the weak link is corrected. Weak links are enterprises or conditions that limit your ability to be more profitable (Refer to [Quality Of Life: Tools And Systems For A Healthy Farming Partnership](#), Atina Diffley)

- **Production:** Fertility, water, disease, weeds, pests, seeds, soil quality, knowledge, and experience
- **Harvest and Post-harvest:** Harvest and pack efficiency, temperature-management capacity
- **Quality Control:** Food safety, temperature management, grading, packaging
- **Livestock:** Stock health, grass management, breeding, supplies
- **Mechanical:** Equipment operation, maintenance, and repair; building construction and maintenance
- **Business:** Recordkeeping, legal matters, sales communication, contracts
- **Financial:** Access to capital, cost of production and profitability, accounting and financial planning
- **Employees:** Training, expectations, efficiency, communication, longevity; access to skilled labor
- **Communication and Decision Making:** Facilitation, skill level, systems and processes
- **Market:** Access to, development level of, and quality of buyer relationships, sales, brand identity



## Slide 15: Sustainable Growth

### [Talking Points]

- A farm can start off with basic tools, equipment, and infrastructure, but, ultimately, a wider range of investments may be necessary in order to access school markets. This may result in taking on farm debt/loans for expansion, which is often tied to mechanization. Careful planning should result in a return on investment that you are comfortable with.
- Farmers often expect greater profits with infrastructure improvements that are paid for with loans and debt. If these investments fail, the farmers are left with debt. Careful assessment of crop production and profit and enterprise budgeting are crucial to ensure loans can be paid back with scaled-up production.

**Facilitator prompt:** Review business planning and financial statements in Module 4, Section A in the [Producer Workbook](#).



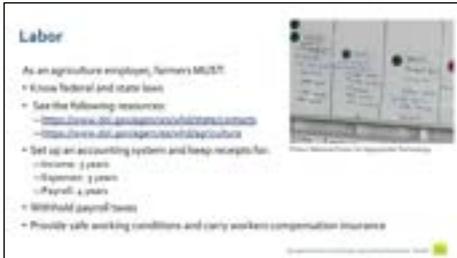
## Slide 16: Scaling Up

### [Talking Points]

- Scaling up often refers to an increase in acreage, herd size, markets, or enterprises. It can also be defined as an improvement to current production systems in order to increase sales.
- All farms experience growing pains, and slow growth is generally less painful than rapid growth. Beginning farmers have the opportunity to design their farms with future growth in mind.
- Considerations for scaling up include:
  - Administrative systems

- Labor management
- Land access and quality
- Equipment and infrastructure
- Potential for increased profitability

*Facilitator prompt: What does scaling up mean when it comes to expanding production to meet school market demands and achieve volumes that allow for profitability at lower profit margins per sale? This slide will help producers understand what areas exist for farm expansion.*



### Slide 17: Labor

#### [Talking Points]

- As you develop your whole-farm school business plan, you will need to determine if extra labor will be required in order to sell to schools. This should include an analysis of costs for labor and equipment, as well as other variable expenses.
- As agriculture employers, farmers MUST know federal and state laws. The resources listed are good sources of information for this ([US DOL State Labor Offices](#) and [Agricultural Employment](#) websites).
- Set up an accounting system and keep income receipts for three years, expenses for three years, and payroll for four years. Remember to set up a system for withholding payroll taxes, provide safe working conditions, and carry Workers Compensation insurance.

*Facilitator prompt: Labor is one of the biggest expenses for a farm or business operation. As a producer looks to expand, they must determine if the increase in sales volume and school markets justifies more labor. Click on the links in the slide to give producers a quick visual recognition of the resources they can access for labor laws in their state. If there is time, you can call on someone and look up their state labor laws.*



### Slide 18: Selling to Schools – Special Considerations

#### [Talking Points]

Considerations for selling to schools focus on capacity, consistency, and infrastructure. These considerations can be addressed by asking the following questions:

- Can you satisfy your school buyers' requirements?
- Can you comply with food safety and quality standards?
- Do you have the ability to move more product through your washing, packing, or processing facility?
- Do you have enough space in your cooler, your delivery truck, etc.?
- Do you have an advanced accounting system to track sales and payments?
- Would you need to bring on more workers? Do you have the capabilities to manage a larger staff?

*Facilitator prompt: Selling to schools presents its own set of considerations, in addition to the more generalized considerations listed above.*



### Slide 19: Meeting the Budget Needs of Schools

#### [Talking Points]

- Schools require a certain volume of product that is consistent in quality and also meets the needs of the food service staff. With the price per unit

likely being less than typical direct-market channels, you must be able to meet these needs while also charging a price that the school can afford. Therefore, you must find efficiencies through scale, labor savings, seconds, input-cost savings, etc.

- Additionally, schools usually have billing requirements that may impact your farm’s cash flow. Net-30, -60, and -90 payment terms, where payment for products is due in full 30, 60, or 90 days after the transaction has completed, are typical for schools. If the transaction is through a national wholesale distributor, the farmer may get paid even later.
- Scaling up may require that a farm offers a line of credit to the school and has capital or access to credit to meet monthly farm expenses.
- Consider negotiating a discount on payment terms with the school if they pay in net-30 days.

**Facilitator prompt:** Section A talked about that bottom-line price for products. Here, tie in considerations with volume, billing, and price and how to address them together.



## Slide 20: Meeting School Grading, Packaging, and Labeling Requirements

[Talking Points]

- There are certain items that must be on labels, and many buyers require all vendors to meet the CNP label standards. Have a conversation with the Food Service Director to understand what they are expecting, if it was not clear in the solicitation/contract.
- Labeling specifies the style, size, and product. Labels provide traceability back to the farm (in the case of a foodborne illness) and may also include any certifications that are associated with the product. Typical information on a label includes the following:
  - Name and address of the farm
  - Julian Date- the continuous count of days from January 1
  - Product
  - Grade
  - Quantity/Count
  - Harvest or Pack Crew Identification
  - Certifications, e.g., Certified Organic
  - Farms may use a code system, such as “Sp619Ac3,” which represents spinach picked on 6/19 from field A by crew or person 3.

**Facilitator prompt:** Schools may buy or deny a product based on the grade, packaging, and label that they requested in their solicitation/contract. They may have standards on package size, weight, pallet stacking, and traceability. This may require the farm to have specialized equipment and/or an increase in labor. It is also important to know that schools may or may not understand industry standards for grading, packaging, and labeling. This may also be the case for Intermediate and Wholesale distributors. If the solicitation does not include the standards in their specifications, it will be important for the producer to clarify.

**Participant engagement:** Show a standard label from a local product at a school. [Need to obtain a sample label.]

- Ask participants to figure out certain Julian dates. Participants can also be asked to explain other code-system examples.
- Encourage producers to share the products they are considering and look up USDA grading standards for them.
- Visit [USDA Grade Standards](#) for a complete list of grading standards



## Slide 21: Food Safety

### [Talking Points]

- As a food producer, you have the responsibility to practice food safety and to reduce the risks of causing an outbreak of a foodborne illness.
- Food safety and scale have important considerations. Full compliance is required for the Food Safety Modernization Act if your farm has \$500,000 in sales.
- There are exemptions for producers that gross between \$25,000 and \$500,000.
- Farms grossing under \$25,000 are exempt.
- The Food Safety section will go into details on these factors as they relate to farm to school.

*Facilitator prompt: Food safety is equally important at every scale of production. Schools (in conjunction with their health department inspectors) define any specific food safety requirements they have (such as requiring a food safety plan, water test, etc. of all vendors). But as farms increase in scale, food safety standards may become more stringent. Farms must take measures to assure that the food they are producing and selling to schools is safe for consumption. A food safety plan focuses on the steps a farm can take to make sure its products are as safe as possible. Therefore, each food safety program should be unique to each individual farm. More detailed information on food safety is provided later in this module, in Section E.*



## Slide 22: Managing Risks with Insurance

### [Talking Points]

- Scaling up a farm in order to sell to schools will require a certain level of liability insurance. Most intermediate market channels also require some level of liability insurance. A farm may also want to consider additional protections in case it is unable to meet the requirements set forth in a school contract.
- Fortunately, there are many resources to help you navigate insurance.
- This may include [Whole-Farm Revenue Protection insurance](#) or some type of catastrophic coverage.
- Some insurance programs, such as the [Food Liability Insurance Program \(FLIP\)](#), offer coverage specific to value-added products.

*Facilitator prompt: Larger-scale production usually means less diversity and an increase in risk. Farmers usually manage legal and economic risks at larger scales with product liability insurance. (Most schools require it for the products they receive; often it's no more than what a farmers market might require—\$1 million product liability insurance for each product sold to schools.) Producers may also utilize crop insurance, if appropriate. Facilitators should familiarize themselves with [Whole-Farm Revenue Protection](#) and other insurance programs (see talking points); or, better yet, ask a representative from Risk Management Agency to speak briefly about Whole-Farm Revenue Protection. Encourage producers to explore the [Farm Commons website](#). This resource has worksheets and school business action plans for farmers to become legally resilient.*



### Slide 23: Scaling up: Final Considerations

#### [Talking Points]

- You may not need to scale up to meet school market demand, but it is likely that if you intend on responding to solicitations of a larger school district, some level of expansion will be required.
- Pricing is a function of volume and scale. Carefully outline the costs associated with a farm expansion and identify the rate of return on that investment when making those decisions.

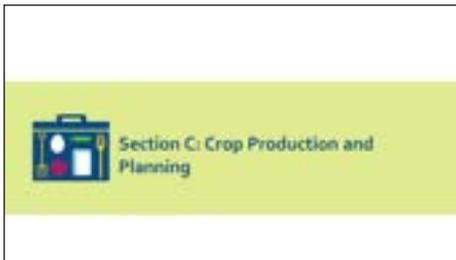


### Slide 24: Applied Activity: Weakest Link to Consider Before Farm Expansion

*Activity objective: Producers will explore the weak link on their farm and how they should consider remedying that weak link before scaling up or selling to schools. Use [Worksheet 4B: Weakest Link](#) (in the [Producer Workbook](#)).*

#### Facilitator prompt:

- Ask producers to spend 5 minutes on [Worksheet 4B](#).
- If time allows, call on producers to talk about what they wrote down and how they intend on addressing their “weakest link.” Why did they identify that particular link?



## Section C: Production and Planning

### Slide 25: Section C: Crop Production and Planning (Title header)

*Facilitator prompt: Discuss why planning is important to meet the consistency and quantity requirements of schools. Note that this section can be omitted for a primarily livestock oriented audience.*



### Slide 26: Producer Spotlight: Living Root Farm

#### How Can Crop-Production Planning Help with School Sales?

#### [Talking Points]

- In order to make money selling to public schools, you have to know precisely how much it costs to do each step in the process of producing and delivering your produce to the marketplace.
- Crop-production planning is another tool to help you make sure the dollars and cents line up and that you can meet the obligations outlined in the solicitation. Let’s hear how one small farm is using crop production planning for selling to a rural school district.

*Click on [embedded video link](#). Playtime 2 minutes (also available on [Bringing the Farm to School Case Studies](#) page).*

*Prompt producers to consider and discuss areas that can be improved for their farm:*

- consistency (succession planting or livestock successions);
- quantity (improved yield or expanded production);
- cost efficiency (less time, better production efficiency)



## Slide 27: Planting Plan

### [Talking Points]

- Crop planting will be based on harvest needs. Determine demand and work back from harvest to planting. Is the product required weekly, monthly, or annually? The sales agreement will determine the specific amount and types of crops.
- When should you be checking in with the school about your plan? When should you communicate if something goes wrong? What grade (and size) does the school want? This will determine the days to maturity.
- Schools provide a reliable market and a bonus is that you can plan your production far in advance!

*Facilitator prompt: Crop planting will be based on harvest needs. The planting plan can be developed for school markets by working backwards from the total amount of product you will be producing for schools. [Johnny's Seed Quantity Calculator](#) can be used to estimate seeds needed, and [Johnny's Seed Quantity & Yield Chart](#) has yield estimates that can be helpful in estimating the number of seeds needed. Presenters can use the chart and online calculators to help participants understand how to develop a planting plan. Links are included below and on the PowerPoint presentation slide.*

Use an example such as summer squash (using [Johnny's Seed Quantity Calculator](#)):

- Show squash yield per acre, row, or plant.
- Identify harvest targets and space requirements.
- What is the production goal?
- How much seed will be needed?
- Space: Plan for enough space and where it will be on the farm.
- Yield calculations will help you identify the amount of space required: plant spacing and number of rows/plants/acres.
- See also ATTRA webinar - [Crop Planning for Vegetable Growers—Resources](#) for details on calculating seed and plant requirements.
- Mention that participants will be able to estimate plot size and seeds needed for scaling up in the Applied Activity.

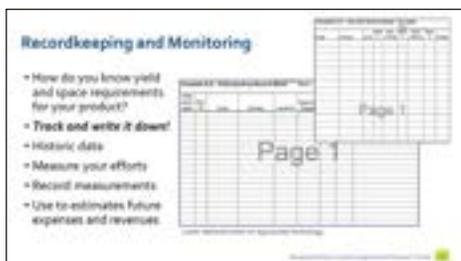


## Slide 28: Crop Planning: It is Not a Perfect World

### [Talking Points]

- With specific agreements on volume and timing, it will be important to plan for yield loss due to pests and disease. Also, consider fluctuations in timing from weather. Bracketing the harvest date by one to two weeks on either side can remedy this.
- Be sure to factor in crop loss as a percentage, so that you plant enough and don't turn up short. Base your loss percentage on your crop records from past years. If your yields from past years vary slightly, use a small loss percentage. If the past yields vary greatly, use a larger loss percentage in your estimate of future production needed to fulfill the current contract.
- Determine the harvest window. Consider a crop succession plan to make harvests overlap throughout the season and to extend the harvest window.
- Plan to have crops come in one to two weeks before the target harvest date, in case cold/overcast weather slows crop growth.
- Also, plan for a product that will be harvestable one to two weeks after the target harvest dates, in case warm weather causes crops to mature more rapidly.
- Johnny's seed calculators mentioned in the last slide can be helpful for determining harvest windows, harvest dates, etc.

**Facilitator prompt:** Crop failure is always a risk. Producers should be prepared and have a backup plan and discuss it with the School Nutrition Director. The school might need to know that if the producer cannot fill an order, they can switch to another source if there is a crop failure. This can put all parties on better footing at the beginning of the season, if they both know there are options.



## Slide 29: Recordkeeping and Monitoring

### [Talking Points]

- Remember that good communication with schools can help you keep input, production, and transportation costs lower than for other markets.
- Previous yield, cropping, sales, and costs records will help you manipulate data in order to get estimates of future expenses and revenues, yields, and timing to help you plan to meet the sales agreement requirements.

**Facilitator prompt:** Most farmers will understand crop rotations and be able to predict the yield of their products, but recordkeeping will help them succeed in understanding which varieties do best for school markets and meet timing, yield, and space requirements. Refer producers to the *Digging Deeper* section in Module 4 of the *Producer Workbook* for more resources on this topic.



## Slide 30: Applied Activity: Crop Planning Exercise

**Activity objective:** Crop producers will understand the quantities, field space, harvest threshold, and the succession planning needed for the sample bid/solicitation document. Use [Worksheet 4C: Crop Planning Exercise](#) in the *Producer Workbook*.

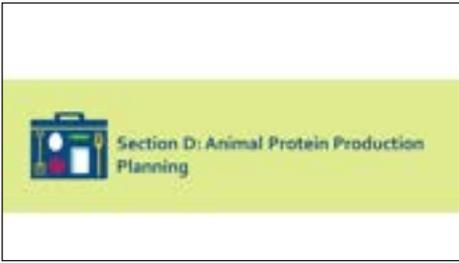
Instruct producers to break into groups, depending on makeup of producer audience:

Crop planning exercise based on school sales.

- Vegetable:
  - Calculate plot size (rows, row size) and seeds needed for scaling up carrot production from 1,000 sq. ft. to ½ acre, based on anticipated yield.  
*Provide Johnny's direct seed chart with worksheet.*
- Grains/row crops (*opportunity for regional/ crop differentiation*):
  - Assess acreage needed, seeding rate, yield, and profitability for grain/pulse crops sold through an intermediary for school procurement.

### **Facilitator prompt:**

- Plan to spend 15-20 minutes on this activity.
- The applied activities will take most of the time allocated for this section. Break out into separate sections based on the types of producers attending the training.



## Section D: Animal Protein Production Planning

### Slide 31: Section D: Animal Protein Production Planning (Title header)

*Facilitator prompt: Discuss why planning is important to meet the consistency and quantity requirements of schools. Note that this section should be omitted for a primarily crop-oriented audience.*



### Slide 32: Applied Activity – How Do Your Livestock Products Fit on the Plate?

#### [Talking Points]

- In this section: you will learn about special school needs for meat and egg production;
- understand livestock planning based on demand, yield projections, and production goals;
- and assess schedules for sustained delivery and profitability.
- What type of livestock or animal protein products are you considering selling to schools?

*Facilitator prompt: Ask producers about the types of livestock products they are considering selling to schools.*



### Slide 33: How Do Your Products Fit with School Demands?

#### [Talking Points]

- Proteins are the most expensive part of a school lunch meal. Thus, consider the cost and versatility of various options that you can offer. For example, ground beef can be delivered frozen and used in various recipes, such as burgers, meatballs, casseroles, meatloaf, tacos, spaghetti, sloppy joes, and stew.
- It is likely that a school is already serving meat, so if the school can take it in the form in which the producer can provide it, and for an affordable cost, substitution may be achievable.
- Meat can be used year-round, so provisioning meat is likely to require higher volumes than seasonal vegetables. Also, think about the cuts or parts that don't fetch top dollar, like dark-meat turkey, for example. Higher-value cuts can be marketed directly or through other conventional means.
- Also, schools can purchase whole beef and auction off the higher-value cuts to staff/families to offset cost. There are all types of opportunities if you are creative.

*Facilitator prompt: Schools are in a position to make large commitments to purchase meat far in advance. This provides both producers and school districts some stability throughout the year. Alternatively, share and discuss the case studies in [Montana Beef to School Resources](#). This web resource discusses the common themes that arise in farm to school partnerships and can be an important resource to give participants an understanding of selling meat products to schools.*



### Slide 34: Karla Buck Podcast Excerpt—Beef to Schools

- Play Podcast Excerpts: Selling Beef to Schools (Carla Buck, Bear Paw Meats). Playtime 2.5 minutes (available on the [Bringing the Farm to School Case Studies page](#)).

**Facilitator prompt:**

- How does Karla use school sales to round out Bear Paw's marketing strategy?
- What is her biggest challenge?
- Listen to the full podcast: [ATTRA Selling Beef to Schools Podcast](#)
- Encourage participants to read more about this in the written case study "Beef To Schools- Bear Paw Meats" on the [Bringing the Farm to School Case Studies](#) page.



**Slide 35: Determine School Needs**

**[Talking Points]**

- Meat portion sizes in schools are usually 2 to 3 ounces per serving. A school serving 100 students would need approximately 12.5 to 18.8 pounds of meat per meal.
- Versatile cuts and products like ground beef; chicken breast, thighs, or wings; and bulk eggs work well in school-kitchen settings. Schools may use alternatives to chicken breast, because there are more affordable cuts.
- A lot of communities are having whole-animal discussions. A producer may have a market for common popular items like chicken breast and wings, but no market for less popular products like chicken legs. By talking to their suppliers (farmers and processors) and learning what is less-used, many food services have figured out how to incorporate these meat products into their meal at an affordable rate.
- For some schools with little capacity for breaking down whole animals, smaller packaging may be better for kitchen efficiency, e.g., 5-pound chubs of ground beef or bulk frozen chicken pieces. This gives the kitchen versatility in preparing various meals. Frozen products allow longer shelf life and increased ease of handling. However, some schools prefer larger bulk-pack sizing, especially if they have a central kitchen, to bring pricing down and reduce package-opening labor.
- For processing, you will need to use a state- or USDA-inspected facility—find out what your school district requires. All states that participate in the state meat and poultry inspection (MPI) program can take state-inspected meat. Otherwise, it must be federally inspected (and it must be federally inspected if it's coming across state lines, regardless). Here is a list of the 27 states that participate in the MPI program. Schools are not always educated about this, so it's important to point out.

**Facilitator prompt:** Have producers bring out their school menu from [Producer Workbook](#) Module 3, Appendix D to determine portion sizes, although these are pretty standardized. This can vary from recipe to recipe (for example, if the beef is served with cheese, then less beef is needed). The key concepts here are versatility and cost. Reference these resources (and review ahead of time):

- [Farm to School Sales: Profiles of Ranches Making It Work](#)
- [Strategies for Montana Beef to School](#)

Discuss some resources on how to find federal and state-inspected processing facilities in your state:

- [Meat, Poultry and Egg Product Inspection Directory](#)
- [Niche Meat Processor Assistance Network](#)

See also, [States Operating Their Own MPI Programs](#)



### Slide 36: Assess Current Production

#### [Talking Points]

- How do you know if your supply will meet school demand?
- Assuming there are roughly 260 pounds of ground beef per carcass if other sub-prime cuts are marketed separately, one carcass would supply enough ground beef for 13 to 20 school lunches, based on the meat portion sizes we covered in the previous slide. Your carcasses may supply more or less, based on the meat cutting guide from your processor.
- For more details, see [How Much Meat to Expect from a Beef Carcass](#).
- Large ranches with established processing linkages can direct ground beef to schools and sell higher-value cuts through their traditional marketing channels. Small farmers may consider combining animal production with neighboring farmers—and using an inspected facility—to achieve needed scale.

Questions to consider:

- What is your production potential, in pounds, of meat and specific cuts?
- What is your break-even price?
- Do you have the acreage and grazing/feeding management skills to produce at the scale needed and sell your products above break-even cost?

*Facilitator prompt: Ask the audience: What are your prospects for supplying consistent meat products to a school? Do you have the capacity to meet schools' needs for one meal a week? Will you need to scale up?*



### Slide 37: Plan Production Based on Demand

#### [Talking Points]

- Once you know how much product is needed, you can assess your production capacity. There are many tools available to help, including this one. *Bring up* [Livestock Compass](#).
- Having a good relationship with your meat processor will yield benefits and can help you communicate effectively with your school chef or food service director.
- See the Digging Deeper section for resources on how to plan production based on demand.
- Let's look at the [Livestock Compass](#) tool for developing a meat-production plan based on a solicitation.

*Facilitator prompt:*

- *Click on the link to access the [Livestock Compass](#).*
- *Show producers its features and how they can use it for planning their production for schools.*
- *Note that it is designed to assist producers who sell products in multiple market channels, including direct marketing and school sales. Review this resource and be ready to discuss its points and how it can help a producer plan production and determine profitability.*



### Slide 38: Eggs

#### [Talking Points]

- Already have poultry infrastructure? Schools need eggs, and if you can provide them, you may be able to add an egg enterprise to an existing farm to add value through school and direct-marketing sales.
- Most schools use liquid eggs or have an outside processor manufacture egg products, so switching to local eggs could take a significant process shift

and will require communication and logistical planning. Egg production considerations include number of birds, infrastructure, processing, and packaging.

- How much product does the school need each week? Do you have the capacity to deliver or scale up for production?
- Consider factors such as seasonal changes, summer vs. winter production, number of birds, etc.
- Eggs are considered a minimally processed product, with washing and packing only. Grading should be conducted, as all eggs sold must be USDA-graded (candling, size). See ATTRA's [Small-Scale Egg Handling](#) for details and more resources.

**Facilitator prompt:** Use examples of school districts that use local eggs, including an FFA chapter that supplies its school district with eggs, a Career and Technical Education school (CTE) that produces eggs for bistro boxes sold as part of a high school's meal program, and a small district purchasing local eggs from a nearby farm.

This memo clarifies USDA's meat and egg requirements: [Procuring Local Meat, Poultry, Game, and Eggs for Child Nutrition Programs](#). See also, [Local Meat in Schools - Increasing Opportunities for Small and Mid-Sized Livestock Ranchers and Fishermen](#).

### Slide 39: Applied Activity: Capacity and Product Assessment for Livestock Producers



**Activity objective:** Producers will understand their capacity to sell meat or eggs to schools and next steps to moving forward with school sales. Use [Worksheet 4D: Capacity and Product Assessment](#), in the [Producer Workbook](#).

**Facilitator Prompt:**

- Plan to spend **20 minutes** on this activity.
- Have producers pull out the menu in Appendix D (or local menu).
- Ask them to assess their capacity for delivering livestock products based on school menu needs and considerations of certifications and processor/distributor characteristics.

## Section E: Navigating School Food Safety Standards When Selling To Schools

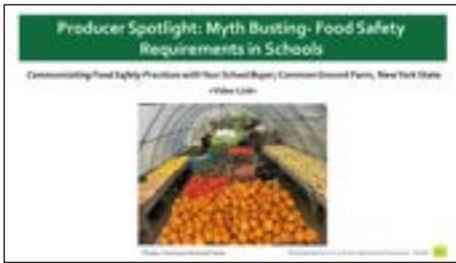


### Slide 40: Section E: Navigating School Food Safety Standards (Title header) [Talking Points]

In this section, we will talk about:

- How to determine food safety requirements of area schools and work with them if the producer is not clear on the school's standards.
- Assessing food safety next steps, based on the school's or other channel's food safety requirements.

**Facilitator prompt:** Food safety standards differ with the type of product. Produce farmers will need to be aware of FSMA and Good Agricultural Practices, whereas livestock farmers and seafood producers will rely more on HACCP, FDA, and state and federal standards. Trainers should choose to focus on the slides and resources that apply to their audience.



## Slide 41: Myth Busting: Food Safety Requirements in Schools

- **Producer Spotlight Video:** Playtime approx. 2 minutes. Common Ground Farm in New York State talks about selling to schools without GAP certification and their communication strategies on food safety with their school district. Full video available on [Bringing the Farm to School Case Studies](#) page.

### [Talking Points]

- The USDA does not have any additional food safety rules above and beyond the laws and regulations that govern a producer's line of business.
- Food safety practices should be implemented, tracked, and communicated to the school to ensure that safe food is being served. This section will focus on navigating food safety requirements of your chosen market channel.

*Facilitator prompt: USDA Child Nutrition Providers have no additional food safety requirements for sourcing local products compared to a farm's sales to other markets, meaning that suppliers must follow all applicable federal, state, and local rules and regulations governing their business. Schools often "outsource" produce safety knowledge and responsibility to distributors, so they may not be well-versed in on-farm food safety themselves. But they are experts in kitchen food safety, as they have annual food safety inspections from the local health department. Schools may adopt the most restrictive standards, due to unfamiliarity. It is important for producers to be educated on food safety and work with schools to ensure they are meeting state and federal requirements to get them to the goal of a safe food supply.*



## Slide 42: Finding School Food Safety Requirements

### [Talking Points]

- The School Food Authority may not have a specified requirement and may lean on the federal and state food safety requirements.
- Schools that set specific food safety requirements or vendor qualifications will communicate them in their solicitations.
- You should have an understanding of what your state food safety requirements are. For example, if you are at a certain scale, you might need to go to a food safety training course or go to a state or USDA-inspected processing facility.

### Facilitator prompt:

- Show example of food safety section on solicitation in Module 2, Selling to Schools, Understanding Product Specifications ([Producer Workbook, Appendix C](#))
- Discuss: Now that you know about looking at solicitations to find out what schools are wanting to purchase, we will dive into the details of meeting their product standards, or specifications. Food safety is a fundamental element of a solicitation:
  - Product Specifications overview
    - Product & variety
    - Quality standards & size
    - Food Safety—as a vendor requirement
    - Quantity
    - Post-harvest handling—freshness
    - Packing & labeling
    - Traceability
  - Other terms and conditions
  - Delivery requirements, insurance, invoicing, payments, etc.



### Slide 43: Other Buyers' Food Safety Requirements

#### [Talking Points]

- When approaching SFAs, check with them about their food safety requirements. These requirements may impact your decision to enter these markets.
- Different distributors will have different food safety requirements. Larger wholesale distributors, such as Sysco and USDA DoD Fresh, will likely require GAP certification, or even standards and requirements beyond GAP.
- Intermediate markets such as smaller food hubs and local distributors may have Group GAP certification or will work with producers to become GAP-certified.
- Some may be flexible and allow certain food safety protocols to take the place of a GAP audit, such as having a food safety plan, attending trainings, and having a current water test on file.

*Facilitator prompt: Explain that going to a distributor will almost certainly require GAP certification. Selling direct to schools may provide more flexibility with food safety certifications. Some aggregators will help producers become GAP certified.*



### Slide 44: FSMA, GAPs, HACCP: What's the Difference?

#### [Talking Points]

Schools often get these terms confused, so as a producer trying to work with schools, you should understand which of these apply to you as a livestock or produce farmer.

- FSMA – Food Safety Modernization Act, Produce Safety Rule is a federal food safety law that applies to all produce farmers. There are exemptions for smaller-sized farms.
- GAP Certification – GAP stands for Good Agricultural Practices; this is a market-driven, voluntary certification program, and some school buyers may request GAP certification. Many distributors and aggregators require GAP certification.
- HACCP – stands for Hazard Analysis Critical Control Point and mainly applies to food processors, including meat processors.

*Facilitator prompt: Define and spell out the acronyms on the slide. Also note that many SFAs refer to HACCP plans and may request a HACCP plan from a farmer, not knowing that farmers follow food safety plans, not HACCP plans. It's important to stress that producers need to understand actual food safety certifications and steps to produce/harvest product safely, in part so they can help School Food Authorities understand what is really required.*



### Slide 45: Where to Get Help with Food Safety

#### [Talking Points]

- You don't want to get customers sick, so a food safety plan and assessment of your risks are a must for every farmer, regardless of who you sell to.
- Depending on the size or enterprise of your farm, you may be required to adhere to certain federal standards.
- The resources listed on your screen are a good place to start for finding out more about food safety resources in your state.

*Facilitator prompt: We don't expect you to be a FSMA or food safety expert, so if you want to expand on this topic, bring in an expert from your state. The list of resources on this slide is a great place to start! Appendix A also lists some great food safety resources.*



## Slide 46: Meat—School Sales and Food Safety Regulations

### [Talking Points]

- Most meat producers will be taking their product to a processor. It is important to understand the difference between a state- and a USDA-inspected facility and know the requirements of the school district.
- USDA-inspected facilities are fewer and further between and can be more expensive.
- The FNS paper [Procuring Local Meat, Poultry, Game, and Eggs for Child Nutrition Programs](#) describes the “three agencies within the Federal Government [that] are responsible for establishing the rules and regulations that govern the sale and use of meat, poultry, game, and eggs in the Child Nutrition Programs (CNPs). These are:
  - The U.S. Department of Agriculture (USDA) Food Safety and Inspection Service (FSIS)
  - The Department of Health and Human Services (DHHS)—U.S. Food and Drug Administration (FDA)
  - The USDA Food and Nutrition Service (FNS).
- Together, these agencies establish rules and regulations to ensure that all products served in CNP meals and otherwise are safe, wholesome, and correctly labeled and packaged.
- You can also get some good advice on how to establish a relationship with a meat processor by reading ATTRA’s [Working with Your Meat Processor](#), which has tips on developing a relationship with a meat processor, including understanding the processor’s needs, understanding your role in producing an excellent product, and having realistic expectations.

*Facilitator prompt: This can be omitted if the participants are mainly fruit and vegetable producers. The same goes for slides 30 and 32 in this section if participants are mainly livestock producers. Become familiar with FNS paper above to discuss federal food safety rules.*



## Slide 47: Food Safety Planning Tools for Accessing School Markets

### [Talking Points]

- Still overwhelmed or just wanting to know more about food safety? Check out the Digging Deeper section of your workbook. There are many available resources to help you address food safety that apply specifically to school markets.
- These resources will provide a producer-based overview of GAP certification, doing an internal audit, and more!

*Facilitator prompt: Go to the food safety links found in the Digging Deeper section of the [Producer Workbook](#) and show the food safety resources. Prompt producers to find the Digging Deeper section in their workbook.*



## Slide 48: Applied Activity: Producer Food Safety Communication Tool

### [Talking Points]

- The food safety risk assessment is a tool you can use to: (1) assess your risk management activities, and (2) describe how you manage risks to buyers, to demonstrate how you address food safety issues on your farm.

**Activity objective:** Review producer communication tools for explaining their food safety practices. Use [Worksheet 4E: Communicating your Food Safety Protocols to School Food Authorities – Risk Assessment](#) (in the [Producer Workbook](#)).

#### Facilitator prompt:

- Spend 10 minutes on this activity
- Prompt producers to go through the questions to assess their food safety risks. Tell producers that they can use this to communicate with schools about their food safety practices.
- If there is time, do a role-playing exercise where producers communicate with the SFA about their food safety practices.



## Slide 49: Action Planning: Let's Check in!

### [Talking Points]

- I understand the “break-even” price point I need for my products to enter or expand into school sales.
- I understand my weakest link to consider before scaling up my farm (e.g., infrastructure, food safety, distribution, etc.).
- I have the beginning of a production plan for my product(s).
- I understand and can communicate my food safety practices to School Food Authorities.

Revisit your School Business Action Plan and write your action steps for moving your product from field to school.

**Facilitator prompt:** Ask producers to flip to the School Business Action Planning Guide in Appendix A of their workbook. Prompt producers to think about their next steps to get their product to schools. Be sure to encourage them to check in with the question prompts from this Module, also listed above. Depending on your overall training schedule, this may be a good time to take a break.

# CONCLUSION: PLANNING FOR ACTION

## About the Conclusion

This module is intended to guide producers in finalizing their School Business Action Plan by summarizing the information and knowledge they have gained throughout the training and identifying key next steps and the resources needed to accomplish them.

CONCLUSION: PLANNING FOR ACTION Estimated Time: 45-60 minutes			
Training Topic and Duration	Learning Objectives	Content and Core Concepts	Training Activities and Materials
<b>A. Overview</b> Duration: 5 minutes	Following this session, producers will be able to: <ul style="list-style-type: none"> <li>Use action planning as a tool to identify motivations and goals, next steps, resources, and contacts for successfully entering or expanding into school markets</li> </ul>	<b>1. Conclusion Overview and Goals</b> a. Recap of Training Content	<b>1. Slide Deck (slides 1-5)</b>
<b>B. Action Planning</b> Duration: 25-30 minutes		<b>1. School Business Action Planning</b> a. Finalizing Your School Business Action Plan b. Activity: School Business Action Plan Share-Out c. Activity: School Business Action Plan Conclusion: Tying it All Together <b>2. Activity: Send a Post Card to Yourself</b>	<b>Slide Deck (slides 6-10)</b> <b>Suggested Activities:</b> <ul style="list-style-type: none"> <li>School Business Action Planning Review and Share-Out</li> <li>Send a Post Card to Yourself</li> <li>Tying it All Together</li> </ul> <b>Materials:</b> <ul style="list-style-type: none"> <li>School Business Action Planning Guide</li> <li>School Business Action Plan: Tying it All Together</li> </ul>
<b>C. Training Evaluation and Follow-Up</b> Duration: 15 minutes		<b>1. Training Evaluation and Follow-Up</b> a. Post-training Survey	<b>Slide Deck (slides 11-13)</b> <b>Materials:</b> <ul style="list-style-type: none"> <li>Post-training Survey</li> </ul>

## Conclusion: Background Information for Facilitators

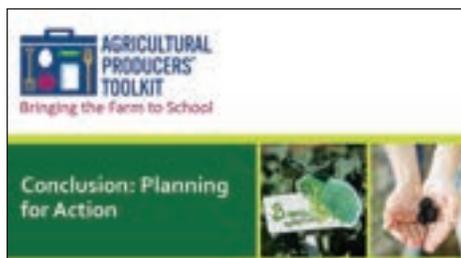
### Core Concepts:

- Action Planning

### Digging Deeper into Core Concepts:

- A Guide for Farm to School Community Action Planning, Vermont FEED

- Download slide deck [here](#)

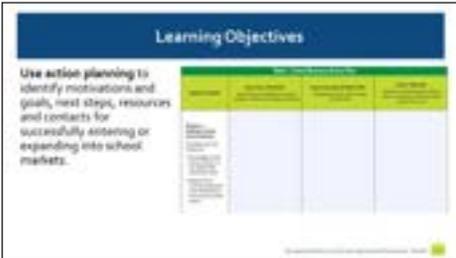


## Conclusion: Overview

### Slide 1: Conclusion: Planning for Action (Title Slide)



**Slide 2: Conclusion Overview** (*Section Header*)



**Slide 3: Learning Objectives**

[Talking Points]

Producers will use action planning as a tool to identify motivations and goals, next steps, resources, and contacts for successfully entering or expanding into school markets.



**Slide 4: Conclusion Overview and Goals**

[Talking Points]

Here's an overview of what we'll be wrapping up as part of the conclusion to this training program:

- Reviewing and editing your School Business Action Plan
- Training Evaluation and Follow-Up



**Slide 5: Recap of Training Content**

[Talking Points]

In *Module 1: Getting to Know School Markets*, we talked about Child Nutrition Program menus, the types of local foods schools typically want to purchase, how those local foods are often prepared, and the process behind how school districts source and purchase local foods for their school meal programs.

In *Module 2: Selling to School Markets*, we learned about three market channels for selling to schools – direct, intermediate, and wholesale distributors – and the basic logistics, knowledge, and skills needed to pursue each one of those markets.

In *Module 3: Product Development for School Markets*, you spent time identifying what products you either already produce or could start producing that might be a good fit for school buyers. This module also included identifying the processing needs of schools (and subsequent infrastructure implications for your farm or business), as well as how best to price your products.

And lastly, in *Module 4: Growing for School Markets*, we dug deeper into pricing products for schools; pros, cons, and logistics of scaling up to meet school demand; and how best to develop and communicate food safety plans to School Food Authorities.



## Section A: School Business Action Planning

### Slide 6: School Business Action Planning (Section Header)



### Slide 7: Action Planning: Finalizing Your School Business Action Plan

*Facilitator prompt: Provide 15-20 minutes for producers to look over their School Business Action Plans (Producer Workbook, Appendix A), make edits, and ask questions.*

#### [Talking Points]

Revisit the key components of your School Business Action Plan, introduced at the beginning of this training:

- Motivations to participate in or expand into school markets (your values and goals)
- Short-term strategies and long-term goals for school sales
- The value you can provide schools
- Action steps for the next six to 12 months following this training
- Resources, contacts, and information you need to implement your plan



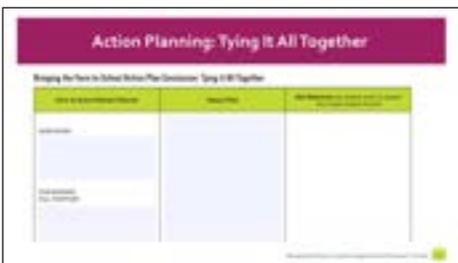
### Slide 8: Action Planning: School Business Action Plan Share-Out

*Facilitator prompt: Allow 15 minutes for small-group or whole-group sharing, depending on the size of the group.*

#### [Talking Points]

This is an opportunity for you to share with your peers:

- Short-term strategies and long-term goals related to farm to school
- Action items or “next steps” for the next 30 days, six months, and one year
- Predicted barriers and TA needed
- Alignment with farm goals



### Slide 9: Action Planning: Tying It All Together

*Facilitator prompt: Ask participants to turn to the last page of their School Business Action Planning Guide in their workbooks (Appendix A). The wrap-up table will be used to pull all the thinking and planning producers have been doing with their School Business Action Plan throughout the training into one document. This wrap-up table is meant to outline specific actions (e.g., the name of a school or distributor producers plan to pursue, their values pitch, key partners) they can pursue immediately after leaving this training.*



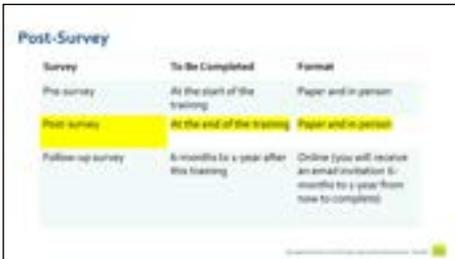
### Slide 10: Applied Activity: Send a Postcard to Yourself

*Facilitator prompt: Producers will be asked to address a postcard to themselves with a goal or vision for where they see themselves in a year. Trainers will collect them and mail them. Ask producers to share their postcard text with the whole group as they feel comfortable. Plan about 10 minutes for this activity.*

## Section B: Training Evaluation and Follow-Up



**Slide 11: Training Evaluation and Follow-Up** (Section Header)



**Slide 12: Post-training Survey**

*[Talking Points]*

You already completed the pre-survey, at the beginning of the training. Now it is time to complete the short post-training survey. As a reminder, these evaluations will help improve future trainings and document the impact of trainings.

- Your participation in the evaluation is voluntary, and you have the right to withdraw at any time. You do not have to provide a response for any survey question you don't want to.
- When you are finished with your survey, please fold them in half (keeping them together), and return them to me.

The third survey will be completed online. An email invitation will be sent to producers by the evaluation team six months to one year after the training.



**Slide 13: Conclusion Slide**

*Facilitator prompt: Please fill out the slide with the appropriate contact information on it.*

# Bringing the Farm to School: An Agricultural Producer's Toolkit

## Glossary of Key Terms

**Action Plan:** A detailed plan outlining actions needed to achieve one or more goals. **Aggregator:** A business that brings product together from many sources. The verb “to aggregate” means to form into a group. Food hubs and broadline distributors are aggregators of food products, which they later distribute.

**Aggregator:** A business that brings products together from many sources. The verb “to aggregate” means to form into a group. Food hubs and broadline distributors are aggregators of food products, which they later distribute.

**Agriculture Improvement Act of 2018 – Section 4207:** Specifies that in order to be compliant with the Buy American requirements, agricultural commodities and the products of agricultural commodities shall be processed in the United States and substantially contain meats, vegetables, fruits, fish, and other agricultural commodities produced in the United States or any territory in possession of the United States. The Act provides clarification on the treatment of harvested fish under the Buy American requirements. Learn more [here](#).

**Break-even Price:** The minimum price needed for a given agricultural product, at which the total cost to produce is equal to the total revenue.

**Broadline Distributor:** A distributor that aims to provide as many products as possible to as many customers as possible. They achieve this by becoming experts at logistics and supply-chain management. They are usually regional or national in scale. Also sometimes referred to as a “prime vendor.”

**Buy American Provision:** Requires school food authorities to purchase, to the maximum extent practicable, domestic commodities or products. This provision supports the mission of Child Nutrition Programs, which is to serve children nutritious meals and support American agriculture.

**Child Nutrition Programs (CNPs):** Federally funded programs administered through the United States Department of Agriculture Food and Nutrition Service (USDA FNS) that help ensure children are receiving nutritious meals and snacks that promote health and educational readiness.

**Child Nutrition Program Director/School Nutrition Director:** The individual responsible for planning, administering, implementing, monitoring, and evaluating all district-wide aspects of a Child Nutrition Program. These positions are at the district level and are often referred to as Food Service Director.

**Child Nutrition Program (CNP) Operators:** School nutrition professionals that manage and run Child Nutrition Programs. These are food service staff working at the local level (school kitchens, central production kitchens), e.g., kitchen managers, production staff, assistants.

**Collective Purchasing:** Utilized when school districts participate in State and Regional Purchasing Cooperatives and Buying Groups in order to help school districts obtain greater buying power and lower prices than they would when buying on their own.

**Contract:** Written agreement between a buyer and a seller in which the buyer agrees to purchase goods or/and services from the seller in exchange for payment transactions.

**Distributor:** A business that supplies goods to other businesses that connect with an end-consumer. A large food-services company distributes food products to many different schools and institutions.

**Enterprise Budget:** A listing of all estimated income and expenses associated with a specific enterprise, to provide an estimate of its profitability. A budget can be developed for each existing or potential enterprise in a farm or ranch plan.

**Farm to School:** Farm to school implementation differs by location but always includes one or more of the following:

- **Procurement:** when local or regional foods are purchased, promoted, and served in the cafeteria or as a snack or taste-test;
- **Education:** Students participate in education activities related to agriculture, food, health, or nutrition; and
- **School gardens:** Students engage in hands-on learning through gardening.

**Federal Procurement Regulations:** An established set of procurement standards found in the program and government-wide regulations that govern how Child Nutrition Programs source and purchase goods and services.

**Food Broker:** An independent business that brokers sales between a farmer/producer and an intermediary buyer, usually a distributor or retailer. Brokers can also serve a role between a buyer and an intermediary, e.g., between the distributor and a school.

**Food Hub:** A business (often nonprofit) that aggregates and distributes food products at a local or regional scale.

**Food Safety Plan:** An outline of the steps a farm can take to make sure its products are as safe as possible. This includes any documentation of practices and certification.

**Food Supply Chain:** The set of trading-partner relationships and transactions that deliver a food product from producers to consumers.

**Food Service Management Company (FSMC):** A commercial enterprise or a nonprofit organization that acts on behalf of a School Food Authority (SFA) by managing or directing any aspect of the school meal program(s). Must meet applicable program requirements.

**Food Safety Modernization Act (FSMA):** A series of seven rules administered by the U.S. Food and Drug Administration that are designed to put forth clear, specific guidelines to prevent contamination in the global supply chain.

**Good Agriculture Practices (GAP):** A voluntary audit that verifies that fruits and vegetables are produced, packed, handled, and stored as safely as possible to minimize risks of microbial food safety hazards.

**Hazard Analysis Critical Control Point (HACCP):** A management system in which food safety is addressed through the analysis and control of biological, chemical, and physical hazards from raw material production, procurement, and handling, to manufacturing, distribution, and consumption of the finished product.

**Healthy Hunger-Free Kids Act – Section 243:** Also known as the “Access to Local Foods: Farm to School Program” provision, this section establishes the USDA Farm to School Program, including grants, technical assistance, and research and data collection and dissemination that supports schools in implementing farm to school and improving access to local foods. Learn more [here](#).

**Intermediary:** A “middle” person or entity that buys product from local producers and then markets the products to school districts, coordinates logistics, and ultimately completes the sale.

**Market Channel:** The path goods take from the producer to the end-consumer.

**National Farm to School Network Core Partner:** Core Partner organizations of NFSN build capacity for and support the expansion of farm to school and farm to early care and education efforts in their states, Washington D.C., or U.S. Territories. Based at nonprofit organizations, state agencies, universities, and other entities, Core Partners serve as liaisons for information, resources, needs and opportunities with the National Farm to School Network. There is one Core Partner organization in each state, Washington D.C., and each U.S. Territory.

**National Farm to School Supporting Partner:** Supporting Partner organizations collaborate with National Farm to School Network Core Partners to support capacity building and expansion of farm to school and farm to early care and education in their states, Washington D.C., or U.S. Territories.

**Perishable Agricultural Commodities Act (PACA) Licensing:** All food business operators must have a Perishable Agricultural Commodities Act (PACA) license; it is proof to customers and suppliers that the business can be trusted to honor the terms of their contracts and that they are abiding by fair trading practices established by the PACA.

**Post-Harvest Handling Practices:** The stage of crop production immediately following harvest; includes harvesting, precooling, cleaning and disinfecting, sorting and grading, packaging, transportation, and storage.

**Price Point:** The price that is chosen for a product, usually when there are several different prices to choose from.

**Procurement:** The act of purchasing goods and services (e.g., food for Child Nutrition Programs).

**Product Traceability System:** Traceability is a system in which fruits and vegetables can be tracked from the field to the buyer, by lot, through unique codes.

**School Food Authority:** The governing body responsible for the administration of nutrition programs for one or more schools and with the legal authority to operate the nutrition program therein or otherwise approved to operate the National School Lunch Program by Food and Nutrition Service.

**School Markets:** The market pathway in which Child Nutrition Programs are the end-consumer.

**School Nutrition Directors:** District-level professionals who oversee all aspects of the school nutrition program for the district, independently or alongside additional school nutrition professionals. They are directly responsible for the management of the day-to-day operations of school foodservice in a district.

**Solicitation:** The process of seeking information and price quotations, bids, or proposals from qualified vendors/suppliers for goods and services as specified by Child Nutrition Program operators.

**Specification:** A precise description of the physical characteristics, quality, or desired outcomes of a commodity to be procured, which a supplier must be able to produce or deliver to be considered for award of a contract.

**State Administering Agency:** The state agency responsible for administration of Child Nutrition Programs. State agencies that administer Child Nutrition Programs vary, and may include departments of education, health, or sometimes agriculture.

**State Agency:** A permanent organization, such as the Department of Agriculture or Department of Education, within a state government, responsible for oversight and administration of state programs.

**University Extension:** A division of a higher-learning institution that provides non-formal education and learning activities to people throughout the country — to farmers and other residents of rural communities, as well as to people living in urban areas.

**Value-added:** A change in the physical state or form of the product (such as milling wheat into flour or making strawberries into jam). The production of a product in a manner that enhances its value, as demonstrated through a business plan (such as organically produced products).

**Value Chain:** Strategic alliances between farmers or ranchers and other supply-chain partners that deal in significant volumes of high-quality, differentiated food products and distribute rewards equitably across the chain.

**Vendor:** A supplier of goods or services.

**Wholesaler:** An entity that may aggregate, process, and/or manufacture products to then sell to an additional distribution partner who then markets to SFAs and distributes the products to the school district or individual school site.

**Whole-Farm Goal Setting:** Distinct from other farm planning approaches because it ties together all of the planning producers do for the *whole* farm. This holistic approach is based on the short- and long-term vision producers and their families have for themselves and the farm.

## Commonly Used Acronyms

AMS	Agricultural Marketing Service	NERO	Northeast Regional Office (USDA-FNS-OCFS regions)
ATTRA	Appropriate Technology Transfer for Rural Areas	NESAWG	Northeast Sustainable Agriculture Working Group
CACFP	Child and Adult Care Food Program	NFSN	National Farm to School Network
CAFF	Community Alliance with Family Farmers	NFUF	National Farmers Union Foundation
CNP	Child Nutrition Program	NIFA	National Institute of Food and Agriculture
FFVP	Fresh Fruit and Vegetable Program	NSLP	National School Lunch Program
FNS	Food and Nutrition Service	NYFC	National Young Farmers Coalition
FSA	Farm Service Agency	OCFS	Office of Community Food Systems
FSD	Foodservice Director	RD	Rural Development
FSMA	Food Safety Modernization Act	SBP	School Breakfast Program
FVC	Farmer Veteran Coalition	SERO	Southeast Regional Office (USDA-FNS-OCFS regions)
GAP	Good Agricultural Practices	SFA	School Food Authority
HACCP	Hazard Analysis Critical Control Point	SFSP	Summer Food Service Program
IAC	Intertribal Agriculture Council	SSAWG	Southern Sustainable Agriculture Working Group
MARO	Mid-Atlantic Regional Office (USDA-FNS-OCFS regions)	SWRO	Southwest Regional Office (USDA-FNS-OCFS regions)
MPRO	Mountain Plains Regional Office (USDA-FNS-OCFS regions)	USDA	United States Department of Agriculture
MWRO	Mid-West Regional Office (USDA-FNS-OCFS regions)	WRO	Western Regional Office (USDA-FNS-OCFS regions)
NCAT	National Center for Appropriate Technology		

# III. APPENDICES

## APPENDIX A: FACILITATOR TOOLS

### Training Best Practices

#### Digging Deeper Resources

- A Coaching Guide for Farm to School & Early Childhood Action Planning, Vermont FEED. 2023. <https://vtfeed.org/resources/coaching-guide-farm-school-early-childhood-action-planning>
- Anti-Oppressive Resource and Training Alliance, <https://aorta.coop>
- Best Practices for Facilitators, People Centric Consulting Group. 2020. <https://blog.peoplecentric.com/blog/best-practices-for-facilitators>
- Facilitating Meetings: A Short Guide, Seeds for Change. No date. <https://www.seedsforchange.org.uk/shortfacilitation>
- Young Farmers Organizing Handbook, National Young Farmers Coalition. 2019. [https://www.youngfarmers.org/wp-content/uploads/2019/02/2019\\_Organizing\\_Handbook\\_Final\\_LoRes.pdf](https://www.youngfarmers.org/wp-content/uploads/2019/02/2019_Organizing_Handbook_Final_LoRes.pdf)

### Introduction

#### Digging Deeper Resources

- The Benefits of Farm to School, National Farm to School Network. 2020. <https://www.farmentoschool.org/resources-main/benefits-of-farm-to-school>
- Research Shows How Farm to School Works, United States Department of Agriculture, Food and Nutrition Service. 2017. <https://www.fns.usda.gov/f2s/research-shows-farm-school-works>
- Whole Farm Plan Guide, Community Farms Program, The Land Conservancy of British Columbia. 2009. [https://www.foodlands.org/wp-content/uploads/2018/05/Whole-Farm-Plan\\_adapted.pdf](https://www.foodlands.org/wp-content/uploads/2018/05/Whole-Farm-Plan_adapted.pdf)
- A Guide for Farm to School Community Action Planning, Vermont FEED. 2014. <https://vtfeed.org/farm-school-planning-toolkit>

### Module 1

#### Digging Deeper Resources

- USDA Child Nutrition Programs, United States Department of Agriculture, Food and Nutrition Service. <https://www.fns.usda.gov/cn>
- USDA Procuring Local Foods for Child Nutrition Programs: Training Program, Institute for Child Nutrition. <https://theicn.org/icn-resources-a-z/procuring-local-foods-for-child-nutrition-programs>

#### Links for Module Activities

##### *Section A: Child Nutrition Programs*

- National School Lunch and School Breakfast Program Rates of Reimbursement, United States Department of Agriculture, Food and Nutrition Service. <https://www.fns.usda.gov/school-meals/rates-reimbursement>
- USDA Farm to School Census, United States Department of Agriculture, Food and Nutrition Service Office of Community Food Systems. 2015. <https://farmentoschoolcensus.fns.usda.gov>
- Bringing the Farm to School Case Studies, <http://www.farmentoschool.org/bringingf2s-casestudies>

## Module 2

### Digging Deeper Resources

#### Section A: Farm to School Market Channels

- How to Sell to Produce Distributors, North Carolina State Co-operative Extension. 2018. <https://content.ces.ncsu.edu/how-to-sell-produce-to-distributors>
- Market Channel Selection Tool, Michigan State University, Center for Regional Food Systems. 2018. <https://www.canr.msu.edu/resources/market-channel-selection-tool>

#### Section B: Selling to School Districts

- Collective Purchasing of Food for Federal School Nutrition Programs Fact Sheet, Public Health Law Center. 2013.
- USDA Grades and Standards, United States Department of Agriculture, Agricultural Marketing Service. <https://www.ams.usda.gov/grades-standards>
- Procuring Local Foods for Child Nutrition Programs, Institute for Child Nutrition and Food and Nutrition Service. 2018. <https://theicn.org/icn-resources-a-z/procuring-local-foods-for-child-nutrition-programs>

### Links for Module Activities

#### Section A: Farm to School Market Channels

- Food Hubs – Local Food Directories, United States Department of Agriculture, Agricultural Marketing Service. <https://www.ams.usda.gov/local-food-directories/foodhubs>

## Module 3

### Digging Deeper Resources

#### Section A: Choosing the Right product—School Considerations

- USDA Food Buying Guide, United States Department of Agriculture, Food and Nutrition Services. <https://foodbuyingguide.fns.usda.gov>

#### Section B: Product Development

- Farm to School Local Processed Price Guide, Washington State Department of Agriculture. 2017. <https://cms.agr.wa.gov/WSDAKentico/farm-to-school/F2SLocalProcessedPriceGuide.pdf>
- Local Processed Product Business Planning Chart, Washington State Department of Agriculture. 2017. <https://cms.agr.wa.gov/WSDAKentico/farm-to-school/F2SLocalProcessedProductBusinessPlanningChart.pdf>

### Links for Module Activities

- Top 10 Most Purchased Produce Items in Washington, Washington State Department of Agriculture. 2012. <https://cms.agr.wa.gov/WSDAKentico/farm-to-school/Top10ListsMostPurchased.pdf>
- Top 10 Minimally Processed Foods in Washington, Washington State Department of Agriculture. 2012. <https://cms.agr.wa.gov/WSDAKentico/farm-to-school/F2STop10MinimallyProcessed.pdf>
- Meat Processing and Inspection Programs, United States Department of Agriculture. <https://www.fsis.usda.gov/inspection/state-inspection-programs>

## Module 4

### Digging Deeper Resources

#### Section A: Business Planning for School Sales

- Estimating Breakeven Sales for Your Small Business, Purdue University. 2005. <https://www.extension.purdue.edu/extmedia/ec/ec-725.pdf>

### *Section B: Scaling Up Production—Meeting Increased Demand For School Markets*

- Quality of Life: Tools and Systems for a Healthy Farming Partnership, Atina Duffley. 2012. <https://atinaduffley.com/wp-content/uploads/Weakest-Link.pdf>
- Grades and Standards, United States Department of Agriculture, Agricultural marketing Services. <https://www.ams.usda.gov/grades-standards>
- Noninsured Crop Disaster Assistance Program and Whole-Farm Revenue Protection: Understanding the Differences, National Center for Appropriate Technology. 2019. <https://attra.ncat.org/publication/understanding-the-differences>

### *Section C: Crop Production and Planning*

- Crop Planning for Vegetable Growers—Resources, National Center for Appropriate Technology. 2019. <https://attra.ncat.org/wp-content/uploads/2023/08/Crop-Planning-for-Vegetable-Growers-Webinar.pdf>

### *Section D: Animal Protein Production Planning*

- Farm to School Sales: Profiles of Ranches Making it Work, National Center for Appropriate Technology. <https://attra.ncat.org/publication/farm-to-school-sales-profiles-of-ranches-making-it-work>
- Montana Beef to School Resources. <https://www.montana.edu/mtfarmtoschool/beeftoschool.html>
- States Operating Their Own MPI Programs, United States Department of Agriculture, Food Safety and Inspection Service. <https://www.fsis.usda.gov/wps/portal/fsis/topics/inspection/state-inspection-programs/state-inspection-and-cooperative-agreements/states-operating-their-own-mpi-programs>
- Local Meat in Schools - Increasing Opportunities for Small and Mid-Sized Livestock Ranchers and Fishermen, United States Department of Agriculture Food and Nutrition Service, Community Food Systems Division. <https://www.fns.usda.gov/f2s/local-meat-schools>

### *Section E: Navigating School Food Safety Standards When Selling to Schools*

- Produce Safety Alliance, Cornell University (for identifying produce safety trainings in respective states). <https://producesafetyalliance.cornell.edu>
- Good Agricultural Practices, Certification Basics, Utah State University Extension. 2016. [https://digitalcommons.usu.edu/cgi/viewcontent.cgi?article=1803&context=extension\\_curall](https://digitalcommons.usu.edu/cgi/viewcontent.cgi?article=1803&context=extension_curall)
- The Seven Principals of HACCP, University of Nebraska Lincoln. <https://food.unl.edu/seven-principles-haccp>

### **Links for Module Activities**

- Enterprise Budgets, Center for Integrated Agricultural Systems, University of Wisconsin-Madison. 2014. <https://cias.wisc.edu/farm-viability/enterprise-budgets-help-farmers-plan-for-profits>
- Farm to School Distribution Cost Template, Oklahoma Farm to School. <http://okfarmtoschool.com/growers-tools/tips-tools-and-guidelines-for-food-distribution-and-food-safety>
- Veggie and Livestock Compass, Center for Integrated Agricultural Systems, University of Wisconsin-Madison. 2016. <http://www.veggiecompass.com>
- Seed Quantity Calculator, Johnny's Selected Seeds. [www.johnnyseeds.com/growers-library/online-tools-calculators.html](http://www.johnnyseeds.com/growers-library/online-tools-calculators.html)
- Transplant Yield Estimator, Johnny's Selected Seeds. <https://www.johnnyseeds.com/growers-library/vegetables/vegetables-transplanted-crop-plant-quantity-yield-chart-pdf.html>
- Direct Seed Yield Estimator, Johnny's Selected Seeds. <https://www.johnnyseeds.com/growers-library/vegetables/vegetables-direct-seeded-crop-seed-quantity-yield-chart.html>

## **Conclusion**

### **Digging Deeper Resources**

- A Guide for Farm to School Community Action Planning, Vermont FEED. 2014. <https://vtfeed.org/farm-school-planning-toolkit>

# Planning a Panel

## Producer and Buyer Perspectives on Farm to School

This training program is designed to incorporate multiple applied activities, such as producer panels or facilitated discussions, which are intended to reinforce concepts and principles covered in the curriculum. We advise having at least one panel or facilitated discussion that features farmers selling to schools for each producer workshop.

### *Promising Practices:*

- We recommend facilitating this panel discussion at the end of the first day of your training. This is a great way to reinforce concepts from Module 1 and 2, as well as build in some networking time at the end of the day. The panel conversation can also serve as a great example to refer back to as you deliver Module 3 and 4 content.
- Consider hosting this panel at a local school or Child Nutrition Program site to reinforce experiential learning.
- Display panelist profiles and farm to school in action photos on-screen during the panel.
- Moderator should translate language from producers and CNP panelists into common terms, tease out themes and concepts covered in curriculum, and stay solution oriented! Consider identifying a moderator who has a working relationship with at least one of the panelists to better facilitate conversation.

### *Recommended Panel Participants:*

- Two to three agricultural producers who have experience with farm to school in the region
  - *Note: We recommend trying to incorporate a variety of producer types: fruit and vegetable growers, meat producers, fisheries and seafood production, grain producer/processor, dairy, producer/processor, etc.*
- One to two school district representatives or Child Nutrition Program Directors who have experience with farm to school in the region
  - *Note: Make sure they can speak to their experience of working directly with producers or distribution partners.*
- One distribution partner who works with local producers and school districts in the region
- One moderator/facilitator from your training team

### *Sample Questions:*

Questions should be customized for each specific training audience but will be anchored in addressing common myths about accessing school markets.

- *Producer:* Tell us about your farm/operation and farm to school activities:
  - Location, scale/acres, product diversity, other markets
  - How many schools do you work with?
  - What products do you sell? Volumes/frequency?
  - What are your on-farm/business practices?
- *School/CNP Representative:* Tell us about your school:
  - *Location, scale/number of students served, foodservice model*
  - *How many producers do you work with?*
  - *What are your product and processing needs?*
  - *What are your purchasing practices?*
- *Both:* What motivates you to do this work?
- *Both:* What are some of your farm to school successes? (promising practices)
- *Both:* What were some of your biggest barriers?
- *Both:* What perceptions did you have or have you heard from other farmers/FSDs that you found were not always true or that you have been able to work through? (myth-busting)
- *Both:* What tips would you share with schools/producers?
- *Both:* What do you see for the future of farm to school in your community?

## Building Your Training Team

This training program is designed to be led by a training team of both experts and partners with lived experience in local procurement and implementing farm to school programs. To keep things manageable, your team should have no more than six team members and include a variety of roles and perspectives to ensure you are able to support the needs of all the types of agricultural producers you will be inviting to your Local Producer Training event.

### An Ideal Training Team:

- Two to three state agency representatives (ideally the State Administering Agency for CNPs and/or State Farm to School Coordinator like the Department of Education, Agriculture or Health)
- One to two Cooperative Extension Educators or County Agricultural Agents
- One to two producer-support organizations (nonprofits, farmers market and grower group/cooperative representatives, nonprofit staff providing technical assistance to producers and/or schools in the region)

### Training Team Checklist:

- Expertise and Diversity
  - **Does your training team include more than one State agency representative?** It's a good idea to include both Department of Agriculture and Department of Education staff on your training team (at a minimum). The training program content covers both Child Nutrition Programs and procurement from the school perspective, as well as how to grow, market, and sell to schools from the producer perspective. For example, if your state administers Child Nutrition Programs through the Department of Education or Health, reach out to your Department of Agriculture to get them involved. For guidance on farm to school stakeholders to engage in your state, reach out to your [FNS Regional Farm to School Lead](#).
  - **What other expertise and perspectives are missing from the team?** If your State agencies do not have significant experience working directly with producers, it's important to identify Extension agents and organizations in the state and region where the training will be hosted who do. Reach out to National Farm to School Network (NFSN) or National Center for Appropriate Technology (NCAT) for support in identifying producer-support organizations.
  - **Do you have producers helping you facilitate the training?** Have you reached out to producers of color? Small and mid-sized producers? Depending on the region, have you considered including producers who specialize in meat, grain, dairy, and / or fruits and vegetables? If not, this is a great task for producer-support organizations to provide guidance on.
  - **Do you have farmers experienced with farm to school available to support your planning?** Farmers in your region or state who are experienced with selling to schools can share direct experience about accessing or expanding into school market channels and can provide additional expertise on accessing grants and loans, building relationships with school buyers, and incorporating farm to school into business planning.
- Partner & Funding Availability
  - What time of year is best for facilitating your local training? It's important to consider both producer availability (what time of year are producers planning?) as well as the availability of State agency and producer-support organization representatives.
  - What federal, state, and local funding is available to support your team members' participation? Please see the [Planning and Outreach Guide](#) for a list of funding opportunities.
  - How does the timing of the training align with funding availability, fiscal years, and grant timelines?

## Sample Training Agendas

### Option 1: Two-Day In-Person Training (*Recommended*)

This training program was designed to be covered in two days. This provides ample time to cover all curriculum content, as well as include peer-learning and on-farm opportunities, such as a producer panel and site visit to nearby farms and food-business operations.

#### Day 1

- Breakfast and Registration
- Project Evaluation
- Introduction: The Power of Farm to School (approximately 30-35 minutes)

- The introduction is intended to provide framing and set the stage for the overall training. Trainers will cover what farm to school is, potential benefits for producers, and an overview of the training modules. This is also an opportunity for producers to share experiences, answer initial questions, and do some myth-busting.
- **Module 1: Getting to Know the School Market** (approximately 1 hour)
  - During this module, trainers will provide an overview of school markets and procurement, as well as guide producers in identifying a product or products that they intend to or would like to sell to schools.
- Break (10-15 minutes)
- **Module 2: Selling to School Markets** (approximately 2 hours)
  - Once products have been identified, the trainers will assist producers in choosing the right market-channel mix. Trainers will provide an overview of direct vs. indirect market channels, considering solicitations, product standards and specifications, vendor requirements, and relationship building.
- Lunch, Networking, and Transit Break (45-60 minutes)
- **Local Learning Opportunity** (choose one or both depending on time available and access to local schools and partners)
  - **Site Visit: School district or Child Nutrition Program site** (approximately 2 hours)
    - We recommend using a site visit to give producers the opportunity to experience school meal programs. Be sure to check out kitchen infrastructure, food preparation and processing practices, cafeteria-based promotion, and education efforts, etc.
  - **Farm to School Perspectives Panel** (1.5 hours)
    - These discussions create an important opportunity for incorporating local context, answering specific marketing questions, and addressing common misconceptions. In addition, they are a great way to emphasize peer learning and build in networking time between producers and school market representatives. The panel could even take place on-site at a school, local farm, or food business.
- **Wrap-Up & Networking**
  - Peer-to-peer relationship development is an important part of the in-person training experience. Providing opportunities for attendees to socialize informally and share a meal together will improve participants' experience and increase opportunities for learning.

## Day 2

- Breakfast and Networking
- **Site Visit: Local Farm or Food Business** (approximately 2 hours)
  - This is an opportunity to visit a local farm or food-processor operation with farm to school in their business/marketing plan. Ask the producer to show critical areas of infrastructure, transportation, and products utilized and/or needed for selling to schools. Facilitators should connect to curriculum concepts and shared language. We also recommend leaving time for a Q & A with the producer about their operation and their experience with selling to schools.
- Transit Break
- **Module 3: Product Development for School Markets** (approximately 1 hour)
  - During this module, trainers will help producers assess product-development options for school markets.
- Lunch (45-60 minutes)
- **Module 4: Growing for Schools** (approximately 2.5 hours)
  - Once producers feel comfortable with the products they want to sell to schools, their development options, and the most feasible and appropriate channel to sell, trainers will cover moving that product from field to school. This includes business planning, scaling up, crop production and planning, livestock production, fish and seafood production, and navigating food safety standards.
- **Conclusion: Planning for Action** (approximately 45-60 minutes)
  - During the conclusion, trainers will guide producers in developing producer action plans based on Day 1 lessons, worksheets, and next steps.
- Training Wrap-Up & Evaluation Instructions (approximately 15 minutes)

## Option 2: Full-Day In-Person Training (*Consolidated Content*)

Although it may be preferable for busy producer schedules, hosting a one-day training makes it difficult to cover all the content while also including peer-learning and site-visit opportunities. Consider the needs of your participants and adjust the curriculum content accordingly to cover the most salient topics.

Recommendations for prioritizing content:

- Provide producers with the [web assessment](#) beforehand, to identify their strengths and weaknesses as it relates to the training curriculum.
- Have producers submit their web assessments to you and identify the key areas of needed training and support.
- Review the curriculum outlines (pages 11-17) to identify learning objectives that align with the producer areas of needed training.
- Customize module content to include the identified priority areas.
- We recommend prioritizing at least one local learning experience – panel or site visit – in your training. You can also consider hosting these site visits as follow-up events or online.

### *Full Day*

- Breakfast and Registration
- Project Evaluation
- Introduction: The Power of Farm to School
- Module 1 (Customized Content): Getting to Know the School Market
- Break
- Module 2 (Customized Content): Selling to School Markets
- Working Lunch: Farm to School Perspectives Panel- optional but recommended
- Module 3 (Customized Content): Product Development for School Markets
- Break
- Module 4: Growing for Schools
- Conclusion: Planning for Action  
— Training Wrap-Up & Evaluation Instructions
- Site Visit: Local Farm or Food Business (*opt onal but recommended*)

### **Other Options**

We understand that producer schedules are busy, and it is difficult to find two days in a row for everyone to be available and take a deep dive into both classroom content and site-visit commitments. Creating more flexible training schedules can ensure more producers have access to the program. Options for modified training approaches include:

- Spreading out the training over several weeks. For example, instead of a two-day training, consider four half-days spread out over two or three weeks.
- Combine virtual and in-person learning opportunities. Depending on availability and travel capability, portions of the training may be presented in a virtual format with site visits and panel experiences in person.
- Half-day trainings are ideal for producers who are very familiar with farm to school and are interested in building upon the relationships they already have with schools, investing in new infrastructure and safety plans, and expanding their product offerings for school meals. An ideal half-day scenario for producers who already know the basics of farm to school and school meal programs would be to focus on Modules 3 and 4, which take a deep dive into product development for schools and how to grow for school markets, including business planning, scaling up, crop production and planning, livestock production, fish and seafood production, and navigating food safety standards.

Remember, **the goal of this training is to ensure all agricultural producers are able to build their capacity to launch or expand efforts to market to schools.** This means meeting producers where they are and supporting them in accessing the information they need to succeed.

# APPENDIX B: PRODUCER TOOLS

All case studies can be accessed here: <http://www.farmtoschool.org/bringingf2s-casestudies>

## Introduction

### Worksheets and Activities

- Farm to School Business Action Planning Guide, Producer Workbook, Appendix A

### Case Studies

- Podcast:
  - Producer-Buyer Farm to School Perspectives (Fiery Ginger Farm and Natomas Unified School District, California)

## Module 1

### Worksheets and Activities

- Worksheet 1A: Getting to Know Your Local School Market
  - USDA Farm to School Census, United States Department of Agriculture, Food and Nutrition Service Office of Community Food Systems. 2015. <https://farmtoschoolcensus.fns.usda.gov>
- Worksheet 1B: Finding the School Meal Program for You

### Case Studies

- Written Case Studies:
  - Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)
  - Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&R Poultry and Produce)
  - The Right Product and The Right Partnership (Kenneth Sweat, Sweat's Produce)
- Podcasts:
  - Accessing the USDA Fresh Fruit and Vegetable Program as a Market Opportunity (Joseph Martinez, Arizona Microgreens)
  - Building Sustainable Relationships with School Nutrition Programs (Rae Rusnak, L&R Poultry and Produce)
- Videos:
  - Regenerating Paradise, Hawaii Center for Food Safety (Dash and Erika Kuhr, HIP Agriculture) <https://www.youtube.com/watch?v=9Yc7sNb-6qo>
  - Taking Root: Farm Fresh School Food, Michigan State University Center for Regional Food Systems (Mary Brower, Blue Stem Farm) <https://www.youtube.com/watch?v=kU7llclJ1RU>
  - Farm to School in the Garden State (Northeast Organic Farming Association of New Jersey) [https://www.youtube.com/watch?v=s0\\_380B8fio](https://www.youtube.com/watch?v=s0_380B8fio)
  - Collards in the Cafeteria (Gaston County, North Carolina) <https://www.youtube.com/watch?v=CVaqieqMdec>

## Module 2

### Worksheets and Activities

- Worksheet 2A: Market Channel Assessment
- Direct-to-Schools Solicitation Packet
  - Sample Solicitations
  - Worksheet 2B: School Market Readiness Evaluation
  - Worksheet 2C: Responding to School Solicitations
  - Worksheet 2D: School Nutrition Director Meeting Checklist

### Case Studies

- Written Case Studies:
  - Local Apples through DoD Fresh in Montana (Grasmick Produce and Swanson's Orchard, Montana)
  - Leveraging Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm, New Mexico)
  - Farm to Food Hub to School (Food Connects Food Hub, Vermont)

- **Podcasts:**
  - Is Farm to School Distribution via DoD Fresh Right for You? A Conversation with Chris Gaskell from Grasmick Produce
  - Leveraging State Partnerships to Access School Markets (Alma Maquitico, Anthony Youth Farm, New Mexico)
  - Farm to School to Farm Again (Alicia Ellingsworth, KC Food Hub and KC Farm School)
- **Videos:**
  - Farm to Food Hub to School (Food Connects Food Hub, Vermont)
  - Frozen Fresh (Michigan Farm to Freezer)
  - Growing Farm to School: Partnering with a Distributor (Amazing Grace Family Farm)

## Module 3

### Worksheets and Activities

- Values Pitch Exercise
- **Worksheet 3A:** Product Planning Chart

### Case Studies

- **Written Case Study:**
  - Purchasing from Farmers: A Child Nutrition Director’s Perspective (Fayetteville, AR School District)
- **Videos:**
  - Purchasing from Farmers: A Child Nutrition Director’s Perspective (Fayetteville, AR School District)
  - Product Development in Oregon Public Schools: Umi Noodles and Camas Country Mill (Lola Milholland, Umi Noodles and Tom Hunton, Camas Country Mill)

## Module 4

### Worksheets and Activities

- **Worksheet 4A:** Business Planning Considerations for School Sales – Break-even Price and Return on Investment
- **Worksheet 4B:** Scaling Up Production for School Markets – Your Weakest Link and Strategies for Improvement
- **Worksheet 4C:** Planning Crop Production from a Bid Sheet
  - University of Georgia Planting Chart, [https://extension.uga.edu/content/dam/extension-county-offices/richmond-county/anr/Vegetable%20Planting%20Chart\\_C963.pdf](https://extension.uga.edu/content/dam/extension-county-offices/richmond-county/anr/Vegetable%20Planting%20Chart_C963.pdf)
  - Johnny’s Selected Seed- Seed Calculator, <https://www.johnnyseeds.com/seed-quantity-calculator>
  - Johnny’s Selected Seeds Direct Seed Crop Chart, Johnny’s Seeds. <https://www.johnnyseeds.com/growers-library/vegetables/vegetables-direct-seeded-crop-seed-quantity-yield-chart.html>
  - Johnny’s Selected Seeds Transplant Yield Chart, <https://www.johnnyseeds.com/growers-library/vegetables/vegetables-transplanted-crop-plant-quantity-yield-chart-pdf.html>
- **Worksheet 4D:** Livestock Production and Planning
  - How Much Meat to Expect from a Beef Carcass, <https://extension.tennessee.edu/publications/Documents/PB1822.pdf>
- **Worksheet 4E:** Communicating Your Food Safety Protocols to School Food Authorities

### Case Studies

- **Podcasts:**
  - Is Farm to School Right for You? (Katrina Becker, Cattail Organics)
  - Beef to School: Profile of Bear Paw Meats (Bear Paw Meats, Havre, MT)
- **Videos:**
  - Communicating Food Safety Practices with your Buyers (Common Ground Farm, Wappingers Falls, NY)
  - Season Extension and Succession Planning for School Sales (Living Root Farm, Hardin, Montana)
- **Written Case Studies:**
  - Is Farm to School Right for You? (Katrina Becker, Cattail Organics)
  - Beef to School Profile of Bear Paw Meats (Bear Paw Meats, Havre, MT)

## Conclusion

### Worksheets and Activities

- Farm to School Business Action Planning Guide

# APPENDIX C: OPTIONAL ONLINE OR IN-PERSON MODULE

## Lesson Plan: Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs (20 minutes)

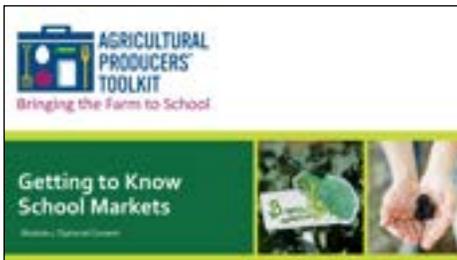
The Bringing the Farm to School Agricultural Producers Toolkit is designed to support agricultural producers in launching or expanding sales to schools for use in “school meal programs” administered through school districts. However, there are other Child Nutrition Programs, including the Child and Adult Care Food Program and the Summer Food Service Program, that may be administered outside of school districts and that offer additional market opportunities. These programs, and the opportunities they present, are discussed in greater detail in this section.

### Key Terms:

- Child and Adult Care Food Program (CACFP)
- Summer Food Service Program (SFSP)
- Sponsoring Organization



## Module 1- OPTIONAL Section C: Opportunities Beyond the Lunchroom – Additional Child Nutrition Programs



Slide 1: Getting to Know School Markets (Optional Content)



Slide 2: Beyond the Lunchroom—Additional Child Nutrition Program Opportunities (Section Header)

### [Talking Points]

Throughout this training, we will be focusing on helping you build your capacity for selling to schools. However, there are other Child Nutrition Programs, which may be administered outside of K-12 schools, that offer additional market opportunities. These programs, and the opportunities they present, are discussed in greater detail in this section.



Slide 3: The Child and Adult Care Food Program and the Summer Food Service Program

### [Talking Points]

- The programs we’ll be digging into are the Child and Adult Care Food Program and the Summer Food Service Program.
- These programs have many similarities with the school meal programs that we have discussed, but also have some important distinctions, including:
  - Location where they take place (often outside of schools);
  - When they take place (often outside the traditional school year);
  - Who administers the programs;
  - Volume and product needs; and, importantly,
  - Who you, as a producer, would contact to make the sale



## Slide 4: Child and Adult Care Food Program Basics

### [Talking Points]

Let's start with the Child and Adult Care Food Program. The Child and Adult Care Food Program (or CACFP) provides meals and snacks for a number of different institutions:

- Child Care Centers
- Family Day-Care Homes
- Afterschool Programs
- Emergency Shelters
- Adult Day-Care Facilities

For the purposes of this conversation, we'll be focusing on Child Care Centers and Family Day-Care Homes.

Just as in other school meal programs, there is a flow of administration from federal to local for the Child and Adult Care Food Program.

- The United States Department of Agriculture Food and Nutrition Service (USDA FNS) administers the program at the federal level. USDA FNS determines the meal pattern and nutrition requirements and reimbursement rates, and provides funding for reimbursement.
- Federal funds are paid to state agencies, which are responsible for administration and oversight of the Child and Adult Care Food Program. Sometimes it is the same state agency that administers other school meal programs, and sometimes it is a different agency.
- The state agency provides funds and oversight either to independent centers or sponsoring organizations.
  - Sponsoring organizations provide administrative oversight, including monitoring, training, and technical assistance, to smaller centers and family childcare homes.
  - Sponsoring organizations can provide you with access to the many centers and family day care homes they support. They may even help coordinate group purchasing or special events to help you connect with the centers and family.
- Later in this section, we'll show you how to find CACFP Sponsors and participating sites in your area.



## Slide 5: Child and Adult Care Food Program at a Glance

**Facilitator prompt:** Federal reimbursement amounts change yearly. Please update reimbursement rates as needed to ensure information is accurate and up to date. Access current reimbursement rates at the [USDA FNS CACFP site: CACFP Reimbursement Rates](#)

### [Talking Points]

Let's take a look at the Child and Adult Care Food Program by the numbers:

- In 2019, the Child and Adult Care Food Program served 4.8 million children each day at a cost of \$3.7 billion in federal spending each year.
- Child and Adult Care Food Program reimbursement rates are slightly less, but comparable to National School Lunch Program rates:
  - From \$0.31 for “paid” meals to \$1.84 for breakfast served to students who are eligible for free meals
  - From \$0.32 for “paid” meals to \$3.41 for lunch served to students who are eligible for free meals
  - From \$0.08 for “paid” meals to \$0.94 for snack served to students who are eligible for free meals

- Even though the reimbursement is slightly less, remember we are feeding much smaller children!
- When we look at what is being served to those children, each Child and Adult Care Food Program meal has the same five meal components as the National School Lunch Program: milk, grain/bread, protein (meat or meat alternative), fruit, and vegetable. **Just as in school meal programs, all of these components could be local!**
- There are a few differences in the Child and Adult Care Food Program:
  - There are slightly different nutrition requirements; specifically, there are not the vegetable color subgroups that we see in the National School Lunch Program.
  - Importantly, there are much smaller serving sizes, as CACFP serves younger children. For example, a serving size of vegetables for children in elementary school would be 3/4 cup. For children ages 3-5 in childcare, the serving size is 1/4 cup.
  - Finally, the use of local and seasonal foods in Child and Adult Care Food Program meals is encouraged and considered a best practice for CACFP by USDA. Local foods enhance CACFP operations by creating healthy environments, increasing quality of meals, and making every mealtime a learning opportunity for children.



### Slide 6: Local Food in the Child and Adult Care Food Program

#### [Talking Points]

According to the 2018 National Farm to Early Care and Education Survey, the most frequently reported sources for local food in childcare sites were the following:

- Farmers markets
- On-site or community gardens
- Individual producers
- Distributors
- Grocery stores/retail outlets

Because of their size and structure, Child and Adult Care Food Program-participating sites may be more likely to purchase directly from a producer (through a farmers market or direct relationship) than school districts are.

- This creates great opportunity for relationship development and opening up new markets with families.
- This is also a valuable market for smaller-scale production or smaller product quantity.



### Slide 7: Summer Food Service Program Basics

#### [Talking Points]

Now let's look at the Summer Food Service Program. The Summer Food Service Program provides nutritious meals to children and teens ages 18 and younger when school is out of session during the summer. This also happens to be when produce is in peak production in many regions.

Summer Food Service may take place at schools, but it may also take place at many other community locations, including:

- Public libraries
- Community centers
- Churches
- Boys and Girls Clubs
- YMCAs
- Day camps
- Some communities have even hosted meals right at farmers markets

The locations where meals are served are called “sites.” Sites don’t just offer meals, but also often offer educational activities and gardening opportunities. The flow of administration of the Summer Food Service Program is similar to that of other Child Nutrition Programs:

- The United States Department of Agriculture Food and Nutrition Service (USDA FNS) administers the program at the federal level. USDA FNS determines meal pattern and nutrition requirements and reimbursement rates and provides funding for reimbursement.
- Federal funds are paid to state agencies, which are responsible for administration and oversight of the program.
- The state agency provides funds and oversight to a sponsoring organization.
  - Sponsoring organizations manage the Summer Food Service Program in communities, including locating and recruiting sites, training and supervising staff, monitoring sites, and managing reimbursement. Importantly, the sponsor is responsible for arranging for meals to be prepared or delivered, so the sponsor will be your primary contact to make a sale.
- Later in this section, we’ll show you how to find Summer Food Service Program Sponsors and participating sites in your area.



## Slide 8: Summer Food Service Program at a Glance

*Facilitator prompt: Federal reimbursement amounts change yearly. Please update reimbursement rates as needed to ensure information is accurate and up to date. Access current reimbursement rates at the USDA FNS SFSP site: [SFSP Reimbursement Rates](#)*

### [Talking Points]

Now let’s look at the Summer Food Service Program by the numbers. In 2019, 2.4 million children were served each day at 47,463 participating sites, with \$481 million dollars in federal spending for the program.

Summer Food Service Program reimbursement rates are higher than reimbursement rates for other Child Nutrition Programs, because all meals are reimbursed at the same rate. No child has to pay for a Summer Food Service Program meal, so all meals are reimbursed at the “free” rate. However, sites that prepare their own food (versus purchasing prepared meals from a vendor), or are located in rural areas, receive slightly higher reimbursement.

Reimbursement Rates:

- \$2.33- \$2.38 for breakfast
- \$4.09- \$4.15 for lunch
- \$0.96- \$0.98 for snack

If you are located in a rural area or can identify a “self-prep” meal program in your area, they may have more flexibility in how they spend their reimbursement, because they are receiving a higher rate.

The Summer Food Service Program provides a little more flexibility in the meal pattern by combining the categories of fruits and vegetables for four meal components:

- Milk
- Vegetables and fruits
- Grains
- Meat/meat alternatives

Just like the other Child Nutrition Programs, all these components can be local!



## Slide 9: Local Foods in the Summer Food Service Program

### [Talking Points]

Summer Food Service Program Sponsors may purchase local food from a variety of sources, including:

- Direct from producers
- Distributors
- Food hubs
- Farmers markets
- Community Supported Agriculture (CSA)
- Food Service Management Companies (FSMC)



## Slide 10: Market Opportunities for CACFP and SFSP

### [Talking Points]

The Child and Adult Care Food Program and the Summer Food Service Program present some unique opportunities for you as a producer:

- Both programs come in a broad range of sizes and volume needs. There is ample opportunity to find a Child and Adult Care Food Program or Summer Food Service Program that fits your level of production.
  - For example, a small Child and Adult Care Food Program site serving young children may need very small volumes and is a good fit for a small producer. Some Summer Food Service Program Sponsors prepare food for a large number of sites, which would be an opportunity for larger-volume sales.
- Operation through the summer
  - Child and Adult Care Food Program programs often run year-round. Summer Food Service Programs, of course, run during the summer, when your production may be at its peak.
- Flexibility in modes of purchasing
  - Although these programs still have to comply with federal procurement regulations, they may have more flexibility in purchasing, based on their size.
- Family and community engagement
  - Child Care sites and Summer Food Service Program sites offer opportunities to connect with families, which could expand into another market opportunity and increase your visibility in the community.



## Slide 11: Connecting with CACFP and SFSP Programs Near You

*Facilitator prompt:* Show producers how to navigate to the [Summer Meal Site Finder](#) and [National CACFP Sponsors Association](#), in order to identify Summer Food Service Program and CACFP participating sites in their area.

### [Talking Points]

Take a few minutes to explore participating sites in your area. Many schools also operate the Child and Adult Care Food Program and the Summer Food Service Program, so you may start by connecting with schools you already have relationships with. If you are interested in exploring selling into the Child and Adult Care Food Program, you may start by exploring individual sites, finding a sponsoring organization (that could be connected to many sites), or connecting with your state administering agency:

- Find Child and Adult Care Food Program participating sites through the [National CACFP Sponsors Association](#);
- Find a [CACFP Sponsor](#) near you; or
- Connect with your [CACFP State Agency Contact](#).

Summer Food Service Program:

- You can find Summer Food Service Program sites at the [USDA Summer Meal Site Finder](#)
- You may consider starting with your state agency that administers the Summer Food Service Program: [SFSP State Agency Contacts](#)

## Digging Deeper for Module Optional-Content Activities

- Child Nutrition Program Reimbursement Rates
  - Child and Adult Care Food Program Rates of Reimbursement. <https://www.fns.usda.gov/cacfp/reimbursement-rates>
  - Summer Food Service Program Rates of Reimbursement. <https://www.fns.usda.gov/sfsp/fr-032019>
- Summer Meal Site Finder, United States Department of Agriculture Food and Nutrition Service. <https://www.fns.usda.gov/summerfoodrocks>
  - Summer Food Service Program State Agency Contacts, United States Department of Agriculture Food and Nutrition Service. <https://www.fns.usda.gov/contacts?f%5B1%5D=program%3A28>
- Find a Child and Adult Care Food Program Sponsor, CACFP Sponsors Association. <https://www.cacfp.org/resources/tools-providers-centers/find-a-cacfp-sponsor>
  - Child and Adult Care Food Program State Agency Contact, United States Department of Agriculture Food and Nutrition Service. <http://www.fns.usda.gov/cnd/contacts/statedirectory.htm>

## References

- Farm to Early Care and Education for Growers, Rooted. <https://rootedwi.org/youth-education/farm-early-care-education>
- Local Foods in the Child and Adult Care Food Program, United States Department of Agriculture, Food and Nutrition Service. 2015. <https://www.fns.usda.gov/cacfp/local-foods-qasf>
- A Roadmap for Farm to Early Care and Education, National Farm to School Network. 2017. [http://www.farmtoschool.org/Resources/Roadmap\\_FarmtoECE.pdf](http://www.farmtoschool.org/Resources/Roadmap_FarmtoECE.pdf)
- Results from the 2018 National Farm to Early Care and Education Survey, National Farm to School Network. 2019. <https://www.farmtoschool.org/resources-main/2018-national-farm-to-early-care-and-education-survey>
- Summer Food Service Program, United States Department of Agriculture, Economic Research Service. 2020. <https://www.ers.usda.gov/topics/food-nutrition-assistance/child-nutrition-programs/summer-food-service-program.aspx>
- Local Foods and Related Activities in Summer Meal Programs, United States Department of Agriculture, Food and Nutrition Service. 2016. <https://www.fns.usda.gov/cn/local-foods-and-related-activities-summer-meal-programs-questions-and-answers>

# APPENDIX C: OPTIONAL ONLINE OR IN-PERSON MODULE

## Lesson Plan: Fish to School (30 Minutes)

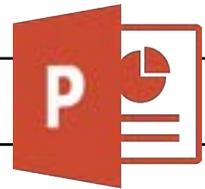
Selling fish to schools provides a unique opportunity for fishers and aquaculture producers that want to participate in the growing farm to school movement. This module provides stand-alone guidance for state agencies and state training teams that are in areas with a substantial seafood or fisheries industry. The learning objectives for this module are:

- Producers will understand, as fishers and aquaculturists, how to approach and work with schools to introduce local seafood into school markets.
- Producers will understand the nuances of school food programs and how seafood fits into the programs, and be able to evaluate the opportunities and barriers to incorporating seafood into schools.
- Producers will know the benefits and obstacles to providing individual sales vs. selling through a vendor.
- Producers will be able to assess their own operation for ability to provide seafood to schools, through developing a marketing tool and talking points to discuss their operation with a School Food Authority.

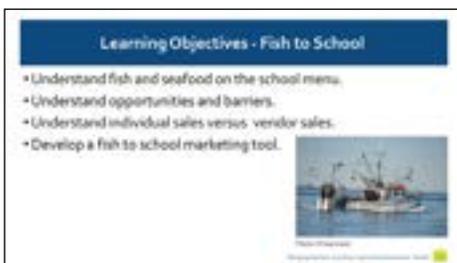
Considerations for this module:

- Collaborate with your state Aquaculture Coordinator and SeaGrant Extension educator for assistance in teaching this module.
- Organize a panel with schools and fishers or aquaculture producers.

- Download slide deck [here](#)



**Slide 1: Fish and Seafood Production for Schools** (Module Header)



**Slide 2: Learning Objectives - Introduction to Fish to School**  
[Talking Points]

- As a result of this session, you'll understand, as fishers and aquaculturists, how to approach and work with schools to introduce local seafood into school markets. You'll understand the nuances of school programs as they relate to seafood and how seafood fits within school lunch programs, and you'll be able to evaluate the opportunities for and barriers to incorporating seafood into schools.
- In addition, you'll gain knowledge of benefits and obstacles to providing individual sales vs. selling through a vendor. You will assess your own operation for ability to provide fish or seafood to schools, through developing a marketing tool and talking points to discuss your operation with School Nutrition Directors.



**Slide 3: Considerations for Working with Schools**  
[Talking Points]

The traditional paradigm in school sales is that menu drives product, but Boat to School and other local seafood programs may be able to reverse this, so that a specific product volume drives the menu offerings.

- The school kitchen creates flexibility by keeping ingredients on hand to handle the various species that are on offer, using materials on hand for various recipes. Communication with the school meal director is very important.
- Dramatic swings in the wild-caught fish market result in variability of prices and offerings. Instead, we look to offer the most abundant fish (whether they be aquaculture species or underutilized wild species), plus a low fixed price (which is the median of up-and-down swings in the market), resulting in flexible dining, as well as a consistent fair living wage for fishers and fish farmers.



#### Slide 4: Considerations for Working with Schools *(continued)*

##### *[Talking Points]*

The first thing to do is to look at what the school is already serving in terms of seafood on the menu. Are there opportunities to substitute a locally sourced item? It is important to know, before you go any further, that seafood popularity in school meals can be highly regionally dependent. Be mindful that there are different levels of seafood “acceptance” in different regions. Start with a conversation with the School Food Authority.

- For fishers: Think menu diversity and use underutilized species. The Bay2Tray program in California uses underutilized and unfamiliar species. This required educating the school staff and the students who eat in the school cafeteria.
- Place “catch of the day” on the menu a few times a month or consider visiting the school classrooms to introduce the students to your livelihood and your product and what it means to be a fisher who cares for the ocean and the fish. This can also be a valuable educational opportunity for students, as they hear your story.
- Determine the menu slots and how many pounds of fish are needed per service in order to calculate your catch or harvest needs.
- The inclusion of local seafood or fish in a meal may require pre-planning on the part of the school kitchen. Food services have an exact idea of how they plan to use the product before ordering. So, it’s a good idea to have a collection of recipes you can offer that work for many different species of fish, and the school kitchen can have ingredients on hand to be more flexible in cooking. Toward this end, consider (and offer education about) which ingredients are useful to have on hand in the kitchen and be ready to provide a recipe or two for the fish that is available.
- Get the school kitchen staff engaged. Tell the story of local fish, farmers, and fishers, and allow them to see the process. This resonates with people and can make your school offering a sought-after item; something they look forward to.
- **Real Good Fish** has a great fish to school program, with an educational component called Fisherman in the Classroom. They hire fishermen to do educational activities with elementary students. They also have a lot of promotional materials for schools that could be used as examples.

**Facilitator prompt:** Discuss case study. Bay2Tray by Real Good Fish works with California school districts and institutions to deliver a local seafood bycatch species, Pacific grenadier. Rather than being cast aside, it is now being served in public school lunches as fish tacos and in soups, replacing processed fish sticks and other traditional offerings. See link to the video in the training slides: [Bay2Tray \(3 minutes\) – Local Seafood & Public Schools](#)

## Slide 5: Freshwater Aquaculture and Aquaponics

### [Talking Points]

- Determine whether aquaponics is the best choice for the school. Unless they are well-established and have excellent market access, aquaponics operations usually make money on either the fish or the vegetables.
- Aquaponics is not just about the fish. Many schools that have aquaponics operations sell the fish to restaurants, due to processing limitations. Aquaculture has high costs of production, so if the ultimate goal of your farming operation is an aquaponics farm to school program, consider where you can get a better price for the fish, and grow the leafy greens to sell to schools.
- This could be an opportunity for a farmer, too: many schools might be interested in hiring staff to manage a school farm or garden.
- Considerations:
  - Develop production schedules and plan for required delivery volume and frequency.
  - Harvesting can be either partial or single-batch. Many aquaculture farmers use single-batch harvesting and have successive ponds or tanks. Partial harvest is better for feed and growth efficiency and allows more regular, timed delivery options. Single-batch harvest is characterized by ease of harvest and is appropriate where species are not held at full-facility carrying capacity (which causes fish growth to slow considerably).
  - Consider type of system (pond, recirculating, cage, raceway), species produced, stocking density, months to maturity (or harvest size), and growing season for the species grown.
  - The essential question is whether you can plan for successive harvests during the school season with your particular production system and offer regular, consistent delivery of quality fish to the school kitchen in the processed format required.

*Facilitator prompt: Fish farming offers less diversity than wild-catch fishing, but also potentially a more regular supply of quality fish.*

- Reference the Oneida Nation operation: received a Farm to School grant from USDA in 2016, includes a four-tank system that holds 70 to 90 tilapia in each tank, and produces more than 100 heads of lettuce a week for the Nation's schools.
- Discuss characteristics of small-scale aquaculture markets (see [Southern Regional Aquaculture Center Publication No. 350](#)), as well as graphic on slide.

See [SRAC publications](#) for production, processing, and marketing information for aquaculture.



## Slide 6: Logistics for Fish Farmers and Commercial Fishers

### [Talking Points]

There are two options for processing fish for schools: delivering frozen fish to the school, or working with a processor or wholesaler for a frozen product. Processing on-farm can be beneficial if you have the scale and experience with direct-marketing aquacultured fish. The Buy American provision requires schools to purchase from U.S. suppliers.

Finding creative ways to meet the school's price point:

- The processor can offer portion sizing, freezing, packaging, etc. Selling

through a processor or wholesaler may offer a lower price but will provide more consistent delivery. The processor will also hold the necessary permits and HACCP plans to comply with state and federal regulations.

- Fishers can couple sales of underutilized species to schools with more-prominent species sold to a fish cooperative, wholesaler, processor, or direct market for higher value. Americans tend to eat from a very short list of fish species, including tuna, catfish, salmon, and shrimp. Species such as redfish, flounder, dogfish, cobia, shad, sole, and hake are just as palatable, and a fish to school program can have the benefit of introducing consumers to new foods that will take the pressure off of overfished species.
- Fishers can find a cooperative or processor that sells local catch to schools. Search for local cooperatives and request information. Some examples include Real Good Fish, Talking Fish, NH Community Seafood, and Cape Ann Fresh Catch.

**Facilitator prompt:** Mention the Buy American provision and the Agriculture Improvement Act of 2018 and understand seafood provisions. No need to go into detail unless producers ask.

- SP32-2019 addresses farm-fresh and wild-caught fish and the requirement to comply with the Buy American provision.
- The Richard B. Russell National School Lunch Act requires schools to purchase, to the maximum extent practicable, domestic food products, including seafood, processed in the United States. Farmed fish must be harvested within the United States, and wild-caught fish must be harvested within the Exclusive Economic Zone of the United States or by a U.S.-flagged vessel.



## Slide 7: Permits for Value-Added Seafood: Considerations to Keep in Mind

### [Talking Points]

States have regulations to ensure food safety for seafood sales, and there are many permits and licenses to consider when selling seafood to schools. State departments of fish and wildlife, departments of agriculture, departments of public health, and city or county authorities may all have input into what permits and licenses are necessary.

So, you may also need to acquire dealer licenses from the state department of agriculture, as well as aquaculture permits for water use, permits for water discharge, disease controls, and a processing plant license, including a HACCP plan filed with the FDA.

- For aquaponics producers, see Aquaponics – Multitrophic Systems for Sustainable Food Production (ATTRA publication) for guidance on requirements.
- Also, consider FDA registration, which is free and must be renewed annually, for direct sales of fish.
- Your state Aquaculture Coordinator and SeaGrant Extension educator can supply detailed information on the types of permits and licenses that are needed for selling seafood to schools.

**Facilitator prompt:** Consider collaborating with your state Aquaculture Coordinator and SeaGrant Extension educator to supply detailed information on the types of permits and licenses that are needed for selling seafood to schools.



## Slide 8: Processing and Storage Logistics

### [Talking Points]

- Find a local processor that works with institutions, as the processor holds the required certifications and licenses. Determine shipment schedules and delivery details. Be sure to maintain open communication with the processor to ensure product quality, portion size, and optimal delivery.
- Consider doing your own processing, at a regional processing center, for smoking and packaging fish.
- If you're operating a farm-based processing facility, comply with all state and federal permit requirements, including HACCP, and consider liability insurance to protect your business.
- Learn from the school the specific product form and portion size needed, and how many pounds are needed per week. When just starting out, you can offer seafood products, say, once a month or a few times a year, and develop your market with good communications and timely delivery. Then, when the chef has confidence in you, you can move up to offering meals once or more per week.



## Slide 9: Communication with Schools

### [Talking Points]

When you tell your story and engage the staff and students, you can establish trust as they gain an understanding of where their food comes from and who produces it. This will go a long way toward establishing your credibility and developing further opportunities to sell products to schools.

- Tell the school staff and students why and how you produce your products: give them a story – think ecology and economy – and incorporate this message into school events. Your story should be place-based and have a face: your face. Tell the story of your farm, your system, your family, your boat, the fishing season, how your products fit in with the local economy, and how the ecology is managed well by your practices. This resonates.
- Introduce sample menus and get staff buy-in. You can conduct chef demos and provide free samples, especially for less-familiar species, and develop signage for the school and lunch room.
- One good idea is to place “catch of the day” species options on the menu with signage.



## Slide 10: Applied Activity - Seafood in Schools Marketing Message

**Writing assignment (Worksheet):** Participants develop a marketing message that would resonate with customers. The message should describe and differentiate their operation and explain their philosophy (for use as a marketing tool and as talking points when talking to the School Food Authority or chef). Have a group discussion on the various messaging options the participants create.

## Digging Deeper Into Fish and Seafood Production for School Markets

- Case Studies:
  - Sea to Campus Case Studies
  - Podcast: Livingston Farm to School Aquaponics Program, ATTRA podcast
  - Real Good Fish
- Publications:
  - Selling Fish to Restaurants and the Public: A Fisher’s Guide
  - Good Aquaculture Practices
  - SRAC publications
  - Aquaponics – Multitrophic Systems for Sustainable Food Production (ATTRA publication)
  - Alaska Seafood Guide for Purchasing Guide for Schools  
*This document includes a lot of useful information. Tips for working with schools, seasonality chart, tips for working with seafood suppliers, etc.*
  - Sitka Conservation Society, A Guide to Serving Local Fish in Cafeterias
  - Fish to School Cafeteria lessons
  - Make It Local: Multiple-size recipes for home, school, parties and catering events, University of Alaska Fairbanks  
*(Includes 11 recipes for various fish species)*
  - Fish Farm Business Plan Workbook, fish-farming production scheduling, species requirements, etc.
- State aquaculture coordinators, Policy, permits, HACCP
- Webinar: How to Increase Locally Sourced Seafood in Institutions, Farm to Institution New England

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# Worksheet 1: Fish Farm Business Plan Workbook

Introduce audience to the [Fish Farm Business Plan Workbook](#):

A business plan helps you develop a business concept and understand the requirements and commitments needed to be successful. It helps you navigate setting up and managing your business and supports potential loan requests.

The [Fish Farm Business Plan Workbook](#) provides a template to walk a producer through the process of writing a business plan specifically for fish farms. Essential elements include the following:

## Elements of Your Business Plan

## Your Notes *(Which elements do you need to work on?)*

Your Business Description	
<ul style="list-style-type: none"> <li>• General Information</li> <li>• Business Description and Products Offered</li> <li>• Industry Information</li> </ul>	
Marketing	
<ul style="list-style-type: none"> <li>• Distribution Strategy</li> <li>• Target Market</li> </ul>	
Management and Operations	
<ul style="list-style-type: none"> <li>• Business Organization</li> <li>• Personnel</li> <li>• Insurance</li> <li>• Suppliers</li> <li>• Licenses and Permits</li> </ul>	
Financials	
<ul style="list-style-type: none"> <li>• Fish Farm Establishment Cost Worksheet</li> <li>• Equipment and Tool Needs Worksheet</li> <li>• Equity Investment Worksheet</li> <li>• Sources and Uses of Funds Worksheet</li> <li>• Sales Projection Worksheet</li> <li>• Operating Expense Worksheet</li> <li>• Personal Financial Statement</li> <li>• Enterprise Budget</li> </ul>	

## Worksheet 2: Seafood to School Marketing Message

Develop a marketing message that would resonate with your customers and draw them to your business.

**Describe your operation (fish farm, shellfish farm, commercial fishing business)**

**Differentiate your operation from other businesses in your area. What do you do differently?**

**Explain your philosophy of production and what motivates you to provide excellent service, quality products, protect the environment, etc.**

**Write a one-paragraph marketing message based on the ideals you have developed above.**

# APPENDIX D: REFERENCES & SOURCE MATERIAL

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## Conclusion

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# APPENDIX E: PROJECT BACKGROUND



## BRINGING THE FARM TO SCHOOL A TRAINING PROGRAM FOR AGRICULTURAL PRODUCERS

### ABOUT THIS PROGRAM

In 2019, the U.S. Department of Agriculture's Food and Nutrition Service (FNS) established a three-year cooperative agreement with the National Center for Appropriate Technology (NCAT) and the National Farm to School Network (NFSN) to develop a farm to school training program for agricultural producers. The goal of the program is to build the capacity of agricultural producers to launch or expand efforts to market to schools. There is significant untapped market potential for producers to sell their products to K-12 schools and the Child and Adult Care Food Program (CACFP). The program supports a wide variety of agricultural producers, including farmers, fishers, ranchers, food processors, and other local food businesses.

The program includes four phases: needs assessment, curriculum development, regional facilitator workshops, and local producer trainings. Using a tiered, train-the-trainer model, the program prepares State agencies and other representatives with the knowledge, resources, and skills necessary to implement the new training curriculum in their states.

### WHY THIS PROGRAM

Farm to school is a strategy for building strong and just food systems. One of the central tenets of farm to school is connecting schools with locally and regionally produced foods to be served in school meals and child nutrition programs, including in K-12 and CACFP settings. According to the USDA Farm to School Census, schools across the country purchased more than \$789 million of locally produced foods during the 2013-2014 school year – a 105% increase over 2011-2012 – demonstrating schools' increasing demand for



local foods and a promising new market opportunity for agricultural producers. With more than \$23 billion spent annually on child nutrition programs, there is significant opportunity for these farm to school activities to continue growing.

As schools' demand for locally produced foods has accelerated, a clear need to equip producers with the support they need to reach this unique market has emerged. This project seeks to meet that need and, in turn, increase producers' interest and participation in farm to school activities. Farm to school is a proven multi-sectoral strategy that benefits agricultural producers' businesses, childrens' health, and communities' engagement in and support of local food systems.

### WHAT'S IN THE CURRICULUM?

To engage the needs of a wide variety of agricultural producers, a needs assessment was conducted to gauge existing knowledge, skill gaps, and specific needs that this new farm to school training curriculum should address (Phase 1).

The needs assessment found that producers seek targeted training on:

- School food procurement rules and regulations;
- Supply and demand, including price points, volume requirements, and seasonal availability;
- Logistics such as delivery requirements and determining what local foods schools buy;
- Food safety; and
- Relationship building with School Food Authorities.

These topics, in addition to other key farm to school concepts, are being directly integrated into the training curriculum (Phase 2). The curriculum will fit a two-day training format with four topical modules. Each module includes a training lesson, skill-building activities, and supplementary resources (case studies, podcasts, and videos) to support deeper learning. The curriculum will be presented in two formats: as a handbook to guide facilitators through offering the training program, and as a workbook through which producers will learn.

## GET INVOLVED IN THE PROGRAM

**Become a facilitator:** The program prepares State agencies and other representatives (e.g., farmer support organizations, nonprofits) with the knowledge, resources and skills necessary to become facilitators and to implement this new training curriculum in their states (Phase 3). Training workshops for State agencies and other facilitators to learn about the new curriculum will begin in 2021. Those interested in becoming a facilitator can visit [www.farmentoschool.org/bringingf2s](http://www.farmentoschool.org/bringingf2s) to learn about upcoming facilitator workshops in your region.

**Participate in a local producer training:** State agencies and other representatives will begin offering the new training curriculum in their states starting Fall 2021 (Phase 4). Agricultural producers interested in participating in a local training can visit [www.farmentoschool.org/bringingf2s](http://www.farmentoschool.org/bringingf2s) for support connecting to a local training opportunity.

**Help spread the word:** Please share information about this program with your networks! Help recruit great facilitators for the regional facilitator workshops and alert agricultural producers in your community that a new training curriculum is forthcoming to learn more about farm to school market opportunities. You can share this one-pager document with interested individuals or direct them to [www.farmentoschool.org/bringingf2s](http://www.farmentoschool.org/bringingf2s) where more information is available.

## LEARN MORE

We encourage you to stay engaged and informed as this program progresses. Visit [www.farmentoschool.org/bringingf2s](http://www.farmentoschool.org/bringingf2s) for the latest project news, information about regional train-the-trainer events, contact information, and more.

### PROGRAM PARTNERS



New York University – Independent Evaluation

### ADVISORY COUNCIL

- Center for Integrated Agricultural Systems- Wisconsin
- Community Alliance with Family Farmers
- Cornell College of Agriculture and Life Science
- Farmer Veteran Coalition
- Georgia Organics
- Intertribal Agriculture Council
- Michigan State University
- National Farmers Union Foundation
- National Young Farmers Coalition
- North Dakota Department of Public Instruction
- State of Washington Department of Agriculture
- Western Montana Growers Cooperative

Updated December 2020

# APPENDIX F: TRAINER ACTION PLAN

## Why a Trainer Action Plan?

The *Bringing the Farm to School Training Program* was designed to maximize learning that is peer-led, experiential, and action-oriented. We aim to have our trainer activities align with the producer training model.

## How to Use the Trainer Action Plan

The [Facilitator Guide](#) and [Planning and Outreach Guide](#) are full of detailed checklists, guidelines, suggestions, and resources for each training team to dig into as they are preparing to host their Local Producer Trainings. The **Trainer Action Plan** will help pull many of the big-picture components of planning a training into one place. It is designed to help *Bringing the Farm to School* regional and state training teams assess their training capabilities and identify important “next steps” to moving forward with training producers on accessing school sales. The assessment statements below are for each state training team to consider together in order to determine potential knowledge gaps, familiarity with the training tools, and comfortability with the overall planning, outreach, and facilitating process.

Once your training team has completed the team assessment, teams are encouraged to use the Trainer Action Plan (Table 1) to insert necessary action steps, corresponding timelines, and any additional resources or tools needed to successfully plan and host a Local Producer Training in your state or region.

## Team Assessment

### Know the Content

- Our training team understands the core concepts of school sales and marketing.
- I know where to access *Digging Deeper* resources for facilitators and producers.
- I know how the *Facilitator Guide* and *Producer Workbook* align and work together.
- I know where to find the learning objectives and essential questions for producers within the toolkit materials.
- I know where to access slide decks, lesson plans, and other training materials.

### Build Your Training Team

- My training team has a diverse set of knowledge, skills, and perspectives to offer and is competent to teach the concepts in the curriculum.
- My training team has a mixture of State agency representatives, Agricultural Extension Educators or Agents, producer-support organization staff, and state farm to school positions.
- My training team has farm to school expertise.
- My training team understands the different needs of meat, grain, dairy, and fruit and vegetable producers.
- My training team has identified experienced farmers in my region to support our training.

### Make It Local

- My training team understands how to customize the content of the training program for my region.
- I understand the needs of the producers my training team is seeking to train.
- I know where to find local and regional examples within my network to include in the training program.
- I know the best places in the curriculum to highlight stories of success, as well as local resources to best support producers in my region.

## Plan Your Agenda

- My training team has contacted farmers and/or school nutrition staff for potential farm visits or panels.
- My training team has decided whether the training will be recorded, livestreamed, photographed, or captured.
- My training team has decided the format and number of days the training will be, considering participant availability and training-team capacity.

## Identify and Reach Your Audience

- My training team has identified the target audience for our training (e.g., vegetable growers, growers in your county, producers struggling financially, etc.).
- My training team has developed an outreach target list (e.g., newspapers, radio stations, existing farmer conferences, networking events, etc.).
- My training team has a plan for recruiting participants (e.g., event webpage for participants to learn more, regular email blasts, sending emails to listservs, social media posts, etc.).
- My training team has a network of potential partner organizations to assist in communication and outreach (e.g., University Extension, Grange Associations, Farm Bureau and Farmers' Union, fruit and vegetable associations, local food policy council, local food hubs, food co-ops, etc.).
- My training team has thoroughly reviewed the [Event Planning, Logistics and Outreach Checklist](#).

## Plan for Action

- My training team understands the whole-farm approach to considering school sales (i.e., how lifestyle, community, financial, farm-management, and production goals can inform school market goal-setting).
- My training team understands the intention behind the School Business Action Planning Guide and how to utilize it during the training.
- My training team knows how to use the end-of-module check ins to quickly assess participant content-understanding, based on essential questions.
- My training team understands how producers can use the School Business Action Plan to identify next steps to pursue after they leave the training.

	Action Steps	Timeline	Resource Needs and Tools for Support
<b>Know the Content</b> Including, but not limited to: <ul style="list-style-type: none"> <li>– <i>Thorough understanding of the core concepts of each module</i></li> <li>– <i>Familiar with Digging Deeper resources for trainers and producers</i></li> <li>– <i>Understand Facilitator Guide and Producer Workbook compatibility</i></li> <li>– <i>Can identify location of resources, such as slide decks, lesson plans, worksheets, and other training materials</i></li> </ul>			

	Action Steps	Timeline	Resource Needs and Tools for Support
<p><b>Build Your Training Team</b> Including, but not limited to:</p> <ul style="list-style-type: none"> <li>– Diverse set of knowledge, skills, and perspectives</li> <li>– mixture of representatives</li> <li>– Farm to school expertise</li> <li>– Understands the diverse needs of producers</li> <li>– Farmers experienced with selling to school</li> </ul>			
<p><b>Make It Local</b> Including, but not limited to:</p> <ul style="list-style-type: none"> <li>– Customization of content for my region</li> <li>– Understanding of producer needs my team is seeking to train</li> <li>– Local and regional examples within my network</li> <li>– Where to highlight stories of success and local resources within curriculum</li> </ul>			
<p><b>Plan Your Agenda</b> Including, but not limited to:</p> <ul style="list-style-type: none"> <li>– Contacting farmers and/or school nutrition staff for potential farm visits or panels</li> <li>– How the training will be captured (e.g., recorded, livestreamed, photographed), if at all</li> <li>– Number of days for the training</li> <li>– Format of the training</li> </ul>			
<p><b>Identify and Reach Your Audience</b> Including, but not limited to:</p> <ul style="list-style-type: none"> <li>– Thorough review &amp; understanding of Planning and Outreach Guide</li> <li>– Target audience for training identified</li> <li>– Targeted outreach list</li> <li>– Identify potential partner organizations to assist in communication and outreach</li> </ul>			
<p><b>Plan for Action</b></p> <ul style="list-style-type: none"> <li>– Understanding of whole-farm approach to considering school sales</li> <li>– Understanding of School Business Action Planning Guide</li> </ul>			

# NOTES

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## Bringing the Farm to School



**BRINGING  
THE FARM  
TO SCHOOL**

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