



Specification Guidance & Innovations in Purchasing Local

*Kentucky Department of Agriculture
Division of Food Distribution
KY Farm to School*

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What Are You Trying To Accomplish?



Your plans and goals may evolve and change over time!

Support local producer?

“Local” may include limitations on farm size.

Trying to use as many local products as possible?

Adopt a definition of “local” that may include a larger area.

Engage students concerning food nutrition and educate students on where their food comes from.

Involve a farmer with student visits to the farm.

Know What You Want

- Define what *Local* Is
- Write Specifications
- Identify what type of Procurement Process you need to follow

Product
Availability

What do Kids
Like to Eat

Specifications

Cycle Menus

What is Local

Product
Variety

What is Local?



There is no Federal definition of local.

Food Service Directors define local.



Example: Within a few miles, within the county or within the State.

Can change with the seasons, types of products or special events.

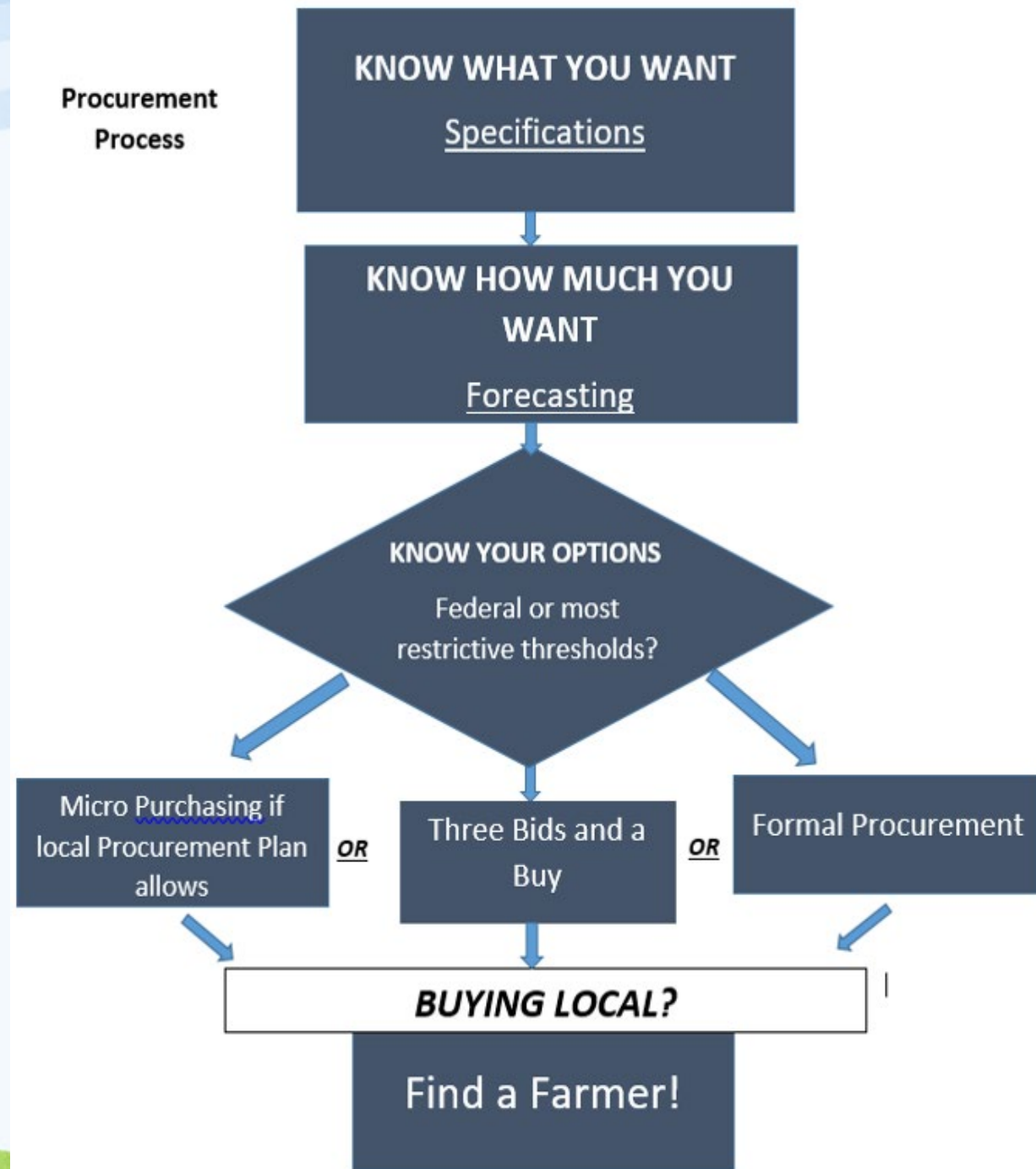
What the Procurement Process Looks Like

Know What You Want

Know How Much You Want

Know Your Options

Find a Farmer!



State and Local Procurement Policies

- Directors must be aware of federal, state and local procurement requirements and comply with all levels
- Check your local procurement plan

Knowledge is Power!

Find out what you can do and use your options to purchase!

Federal	State	Local
Small Purchase Threshold \$250,000.00	Ky Model Procurement Threshold \$20,000.00 or Lower if Local Lower Threshold applies	Local District Small Purchase Threshold Follow Local Procurement Plan
Micro Purchase Threshold \$10,000.00	Micro Purchase Threshold \$10,000.00	Micro Purchase Threshold Follow Local Procurement Plan

Example: Use Product Specifications

Product Specification

Granny Smith

US. Fancy

*Five, 125 count boxes per week
for September - December*



Example: Use Product Specifications

Product Specification

Granny Smith or local variety

US. Fancy or No. 1

2 7/8 size Prefer 125 count boxes
per week but willing to consider
other pack sizes for September –
December

Delivered within 48 hours of harvest



Potential Specifications, Requirements, and Evaluation Criteria to Target Local Products

- *Particular varieties unique to the region*
- *Freshness (Delivered within 48 hours of harvest)*
- *Size of farm*
- *Harvest techniques*
- *Crop diversity*
- *Origin labeling*
- *Able to provide farm visits or class visits*



Other Things to Consider When Writing Solicitations to Target Local Products

- *Be flexible*
- *Don't include unnecessary requirements*
- *Consider what a vendor new to the school food market might not know*
 - *Condition upon receipt of produce*
 - *Food safety needs*
 - *Size uniformity*



Specification Worksheet and Template

SPECIFICATION WORKSHEET

Item Name:	
Description (variety):	
Size:	
Grade/Standard:	
Pack Size/Weight:	
Price Quote: (by lb., dozen, case)	
Ripeness: (Maximum/Minimal level of ripeness that will be acceptable)	
Delivery/Frequency:	
Growing Preference: (Local within Kentucky)	
Other:	

SPECIFICATION WORKSHEET

Item Name:	Strawberries
Description (variety):	Fresh, clean, bright and solid red color with very little green or white; green caps fresh looking; no mold or leaky, damage berries
Size:	U.S. Combination (65% No. 1 3/4" diameter and No. 2 5/8" diameter)
Grade/Standard:	U.S. Combination
Pack Size/Weight:	12 pints to a flat
Price Quote: (by lb., dozen, case)	Quote by the flat
Ripeness: (Maximum/Minimal level of ripeness that will be acceptable)	Fully field ripened
Delivery/Frequency:	
Growing Preference: (Local within Kentucky)	Grown within 75 mile radius
Other:	Delivered within 24 hour of harvest

Know Your Options

*Is micro purchase
an option?*

If yes, what is your threshold?

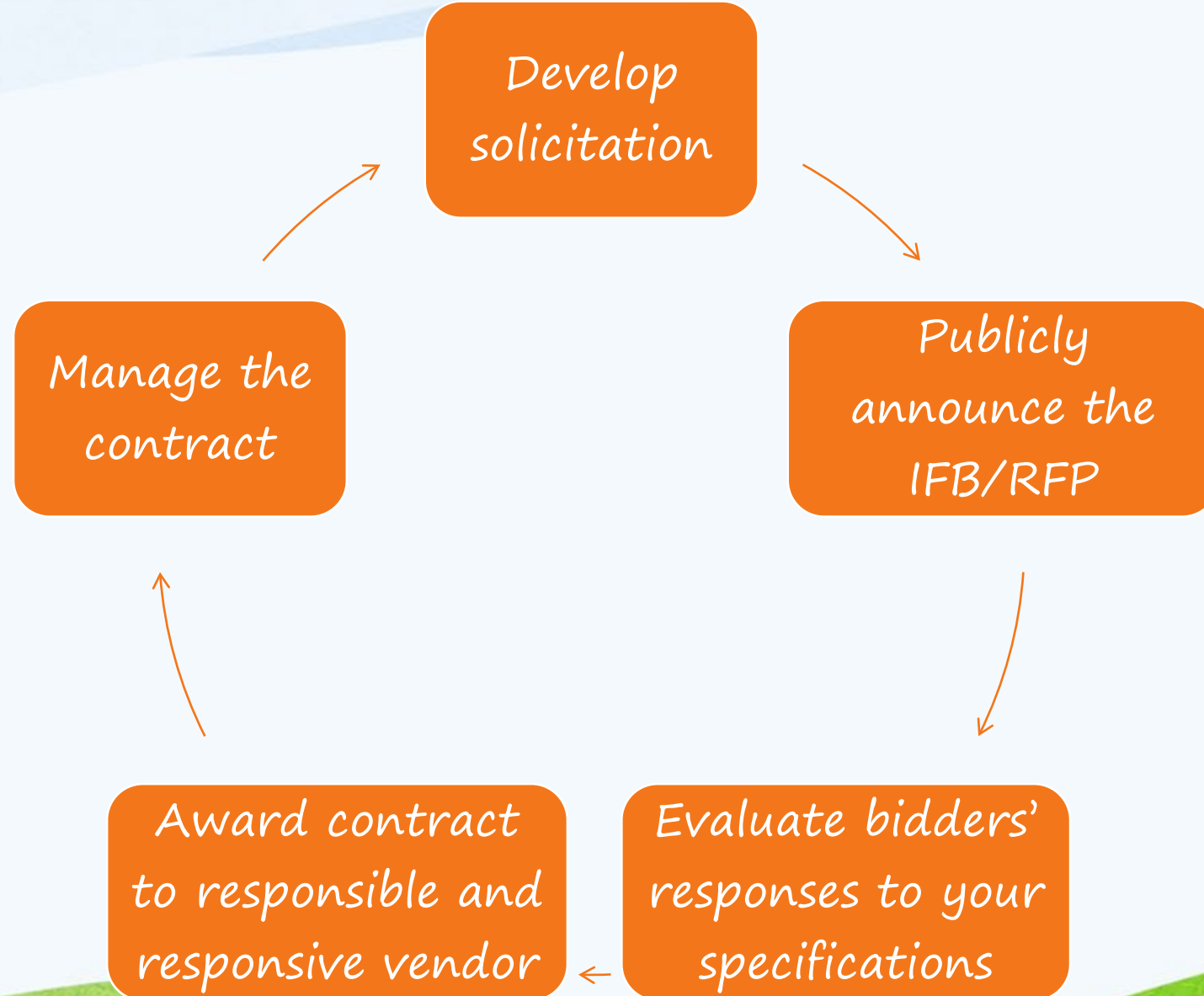
*Will you do
informal small
purchase
procurement?*

*Three bids and a buy (small
purchase procurement)-what
is your threshold*

*Will you do a
formal
procurement bid
process?*

*Sealed bids (IFBs) or
Competitive Proposals (RFPs)
(require public advertising)*

Formal Procurement



Micro-Purchasing Overview

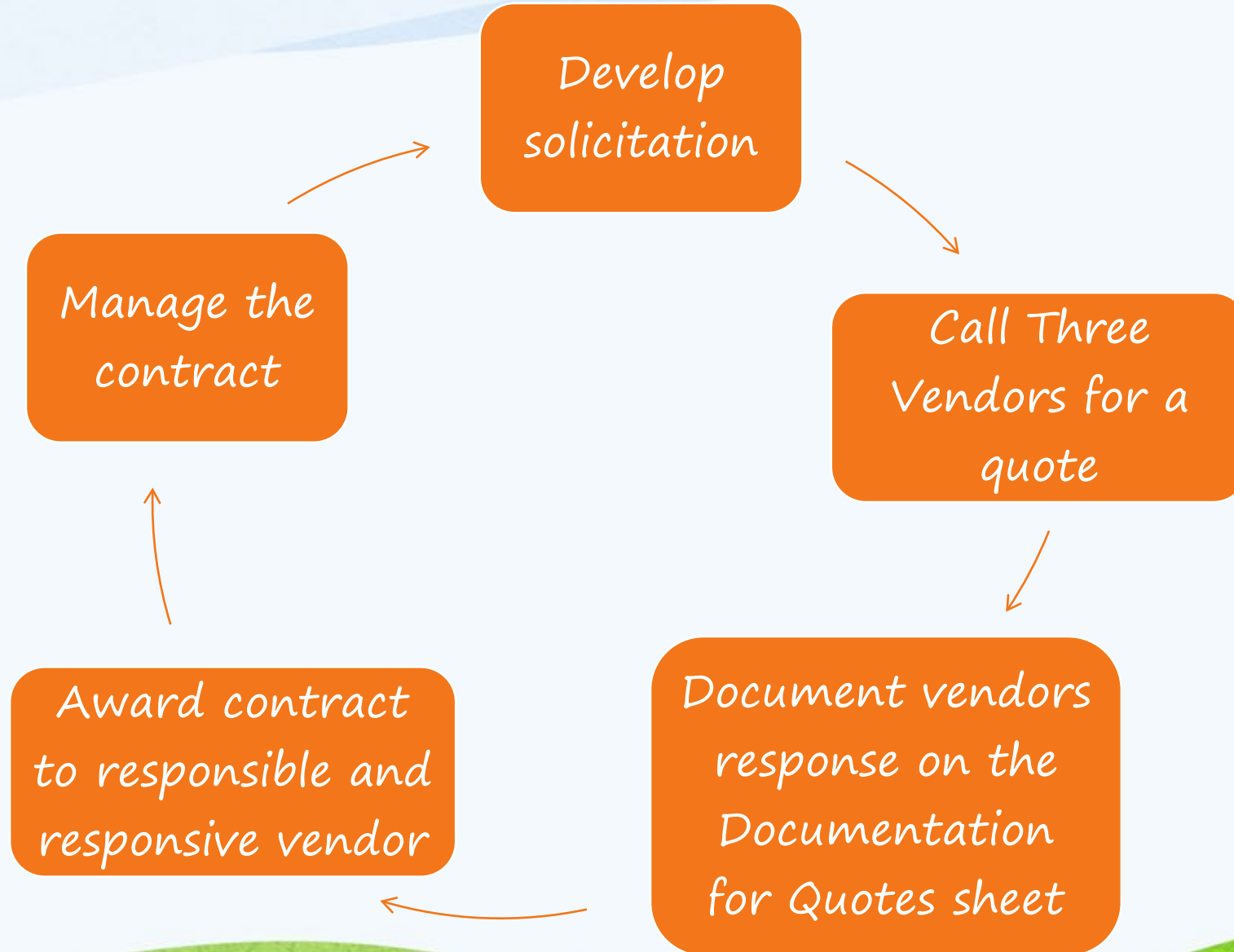
- Federal threshold: \$10,000 or less for all items purchased at one time “per transaction”
- Does your local procurement plan allow and if so, what is the threshold?
- Must purchase from different available vendors to “share the wealth” (not purchase from same vendor each time)



Micro-Purchasing Example

A Director has apples on the menu. The forecast is that 100 cases of apples will be needed, 25 cases at a time, and the specification has been written for Jonagold, or red delicious. Farmers Jones, Green and Brown all grow apples of this variety, as well as other varieties. Quotes are not necessary to compare prices. The Director calls Farmer Jones and finds that he can supply 25 cases immediately. For the next three orders, the Director will alternate between Farmer Green, Brown, and possibly Jones again, to share the wealth and meet the projected requirement. The Director keeps all receipts to show that the purchases were made as equitably as possible.

Small Purchase Procurement



Small Purchase Procurement Overview

- Unable or not interested in Micro-purchasing? → What is your small purchase threshold? Knowledge is power!
- If your purchase is more than your Micro-purchasing threshold then it's considered to be a small purchase! (3 bids and a buy).
- Write your product specifications
- Request prices for the specified item from *three vendors*

It can be a response from farmers or prime vendors.

You may not receive a response from all three vendors.

Document each vendor response and note if a third vendor was not available!

Documentation For Quotations



REQUEST FOR QUOTATIONS

DOCUMENTATION FOR QUOTATIONS VERBAL AND/OR WRITTEN



(Please print or type)

	VENDOR 1	VENDOR 2	VENDOR 3
Telephone No:			
Vendor Name:			
(Date)	Certified Minority: Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
	Address:		
(Division)	City/State/Zip:		
	Delivery Date:		
(Buyer)	Quoted By:		
	Shipping/Freight:		

Item	Quantity	Unit	Description	Unit Price	Extended Price	Unit Price	Extended Price	Unit Price	Extended Price
1									
2									
3									
4									
5									
6									
7									
8									
Please Check Type, as appropriate: Verbal <input type="checkbox"/> Written <input type="checkbox"/>				Total					
				Award					

If Total Purchase is not made from one Vendor, circle extended price of items awarded and sum awards at bottom of column.

Single Quote Explanation/Documentation of Single Source:

There are NO stupid Questions!!!





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