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**Sodium
Reduction
VILT Series**

Procurement of Lower-Sodium Foods

Instructor's Manual

Sodium Reduction VILT Series: Procurement of Lower-Sodium Foods

Instructor's Manual

PROJECT COORDINATOR

Danielle Barrett, EdD, RDN

EXECUTIVE DIRECTOR

Aleshia Hall-Campbell, PhD, MPH



Key Areas:

1000 Nutrition

2000 Operations

USDA Professional Standards Codes:

1300 – General Nutrition

1100 – Meal Planning

2400 – Purchasing and Procurement

2100 – Food Production

INSTITUTE OF CHILD NUTRITION

THE UNIVERSITY OF MISSISSIPPI

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PURPOSE

Improve the operation of child nutrition programs through research, education and training, and information dissemination.

VISION

Lead the nation in providing research, education, and resources to promote excellence in child nutrition programs.

MISSION

Provide relevant research-based information and services that advance the continuous improvement of child nutrition programs.

Disclaimer

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Office of the Assistant Secretary for Civil Rights
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- (2) Fax: (833) 256-1665 or (202) 690-7442; or
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BACKGROUND INFORMATION

Instructor's Note: The purpose of the background information section is to help you become familiar with the context of the training. It is not a part of the training details.

Introduction

In January 2012, the USDA Food and Nutrition Service (FNS) published the final rule, *Nutrition Standards in the National School Lunch and School Breakfast Programs* (77 FR 4088), that updated the meal patterns and nutrition standards for the National School Lunch Program (NSLP), the Seamless Summer Option (SSO), and the School Breakfast Program (SBP) to reflect the *Dietary Guidelines for Americans*. One provision of the updated nutrition standards required the gradual reduction in the sodium content of school meals offered in the NSLP and SBP by meeting progressively lower-sodium targets.

On February 7, 2022, USDA FNS announced *Transitional Standards for Milk, Whole Grains, and Sodium* (87 FR 6984) to support the continued provision of nutritious school meals as schools respond to and recover from the pandemic. The final rule modified the proposed sodium standards by establishing Sodium Target 1 as the sodium limit for school lunch and breakfast in SY 2022–2023 and implementing a Sodium Interim Target 1A effective for school lunch beginning in SY 2023–2024. In 2024, USDA FNS announced the Child Nutrition Programs: Meal Patterns Consistent with the 2020-2025 Dietary Guidelines for Americans, which maintains the current sodium limits—Target 1A for lunch and Target 1 for breakfast—until June 30, 2027 and the associated reductions in lunch and breakfast starting on July 1, 2027.

USDA FNS has conducted studies investigating the barriers and challenges School Food Authorities (SFAs) face when implementing sodium nutrition standards. In 2019, USDA FNS conducted the *Successful Approaches to Reduce Sodium in School Meals* study to examine the market availability of foods that meet the current and future sodium targets for school meal programs and to identify best practices in schools that are successfully meeting sodium targets. These training modules explore some strategies identified as useful in meeting sodium targets.

The Institute of Child Nutrition (ICN) developed four virtual instructor-led trainings sessions to reach school nutrition directors, dietitians, and menu planners nationwide. The training will focus on sodium reduction through menu planning and analysis, procurement, staff training, and maintaining student satisfaction. The intended audience includes directors, dietitians, and menu planners operating heat-and-serve or hybrid (heat-and-serve/speed-scratch/scratch) models focused on reducing sodium in their menus.

Sodium Reduction VILT Series sessions will consist of instruction on the subject, subject matter expert or peer presentation, facilitator-led breakout discussion, and hands-on application. The lead facilitator will introduce the handouts in the chat and BOX folder, the training objectives, a high-level overview of the training content, SMART goals, and the presenters. Following instruction and subject matter expert or peer presentation, the participants will form breakout discussion groups led by a group facilitator. After the training, participants will formulate action plans, including SMART goals, incorporating the gained knowledge into their nutrition program.

Procurement of Lower-Sodium Foods is one of the four virtual trainings. This training focuses on obtaining lower-sodium products and increasing the use of local foods in school menus. The pre-procurement steps include identifying the products that need to be replaced, surveying neighboring school districts, and writing product specifications that facilitate procurement. The USDA Foods in Schools, USDA DoD Fresh Fruit and Vegetable Program, and the USDA Farm to School Grant Program provide resources for schools looking to increase the use of local foods. Strategies for leveraging these programs, collaborating with vendors, and developing criteria for comparing vendor products are also covered. Finally, participants will learn how to reduce the sodium content of school meals and how to develop an action plan to gradually produce lower-sodium school menus.

Prompts are as follows:

SAY: What the instructor is to say to participants. This is the content that teaches the learning objectives.

ASK: This prompt is used when the instructor should ask the participants a question.

FEEDBACK: This prompt is used to ensure certain elements are covered in discussions.

DO: This prompt is used to explain what the instructor or participants are to do. It may be used to lead into activities, do demonstrations, or show videos.

SHOW SLIDE: This prompt is used for showing slides. Each slide must have its own unique title. Slides should not be content-heavy or contain content not covered in the Instructor's Manual.

PRE-/POST-ASSESSMENTS: This manual includes a Pre-/Post-Assessment that will be administered at the beginning and the end of the training.

INSTRUCTOR'S NOTE: The Instructor's Note prompt provides additional information or helpful hints. This information should not be shared with the participants unless prompted. Instructions should be included in the "DO" segment.

FUNCTIONAL AREA AND COMPETENCIES

Functional Area 3: Food Production and Operation Management

Competency 3.1: Develops a management system to ensure high standards for quality food production.

Knowledge Statement: Knows principles of food science and fundamentals of flavor enhancement related to quantity food production, holding, serving, and appealing food presentation.

Functional Area 7: Menu and Nutrition Management

Competency 7.1: Develops guidelines for planning menus that comply with nutrition objectives and support operational goals of the school nutrition program.

Knowledge Statement: Knows menu planning principles.

Functional Area 8: Procurement and Inventory Management

Competency 8.1: Develops procurement guidelines that comply with established regulations and support operational goals of the school nutrition program.

Knowledge Statement: Knows federal, state, and local procurement regulations, policies, and procedures governing all school nutrition program purchases.

Source: *Institute of Child Nutrition. (2009). Competencies, knowledge, and skills for district-level school nutrition professionals in the 21st century. University, MS: Author.*

PROFESSIONAL STANDARDS

Nutrition 1000

Menu Planning – 1100

Employee will be able to effectively and efficiently plan and prepare standardized recipes, cycle menus, and meals, including the use of USDA Foods, to meet all Federal school nutrition program requirements, including the proper meal components.

1150 – Analyze menus for school meal pattern requirements.

General Nutrition – 1300

Employee will be able to understand the Dietary Guidelines for Americans, USDA's food guidance system concepts and general nutrition principles.

1320 – Understand general nutrition concepts that relate to school meals, such as whole grains, sodium, etc.

Operations 2000

Food Production – 2100

Employee will be able to effectively utilize food preparation principles, production records, kitchen equipment, and food crediting to prepare foods from standardized recipes, including those for special diets.

2150 – Understand CN Labeling, product formulation statements and/or appropriate crediting information for school meal pattern requirements.

Purchasing and Procurement – 2400

Employee will be able to effectively and efficiently implement purchasing procedures and practices in order to appropriately and best utilize supplies and USDA Foods to meet menu requirements and comply with all Federal, State, and local regulations.

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

OBJECTIVES

At the end of this training, participants will be able to accomplish the following objectives:

- Describe the pre-procurement steps to obtain lower-sodium products.
- Describe the USDA Foods in Schools, USDA DoD Fresh Fruit and Vegetable Program, and the USDA Farm to School Grant Program.
- Recognize how to leverage USDA programs to increase lower-sodium foods in school menus.
- Identify strategies to incorporate local foods into school menus.
- Identify the tools used to form a cooperative purchasing group.
- Identify the tools needed to make an informed decision about joining a cooperative purchasing group.
- Summarize the advantages and disadvantages of procuring through a cooperative purchasing group.
- Develop a plan to survey neighboring school districts to see what lower-sodium products they recommend.
- Recall strategies for writing product specifications that will facilitate procurement of lower-sodium products.
- Summarize strategies to collaborate with vendors and procurement partners to identify lower-sodium products that are accepted by students and other customers.
- Develop criteria for comparing the various vendor products, e.g., nutrition standards, taste, and student acceptability.
- Develop an action plan to procure lower-sodium foods to reduce the overall sodium content of the menus.

GROUND RULES

ICN has developed Ground Rules to help the class run smoothly and allows all participants to benefit from the course instruction and information. (These Ground Rules can be found on the ICN website – [Ground Rules for Training Mini-Posters.](#))

PREPARATION CHECKLIST

Instructions: The following tasks are necessary for presenting this lesson. Assign each task to a specific person and determine the date that each task must be completed. Keep track of the progress by checking off tasks as they are completed.

Task	Person Responsible	Completion Date	✓
Reserve equipment and gather supplies as needed for use on the day of class (6 weeks prior). Instructor’s Manual Roster of participants attending for instructor List of equipment and supplies needed Computer Microphone Webcam Pens, pencils, note paper Calculator Participant’s Workbook	Instructor		
Agenda, roster of presenters/participants, and handouts			
Pre-/Post-Assessments (available at www.theicn.org)			
Other handouts (documents from outside sources needed for VILT)			



TRAINING-AT-A-GLANCE

TIME ALLOWED	TOPIC
20 minutes	Introduction
60 minutes	Lesson 1: USDA Food Programs <ul style="list-style-type: none"> • Evaluate your menus • Setting sodium limits • Conducting market research • USDA Foods in Schools • USDA DoD Fresh Fruits and Vegetable Program • USDA Farm to School Grant Program • USDA Foods in Schools Available List • USDA Foods in Schools Product Information Sheets • Identify local foods on menu • Look for local options to replace current items • Adjust menus and recipes • Develop new menus and recipes
60 minutes	Lesson 2: Cooperative Purchasing Groups <ul style="list-style-type: none"> • Tools to form a cooperative purchasing group • Tools to join a cooperative purchasing group • Advantages • Disadvantages
60 minutes	Lesson 3: Procurement Strategies <ul style="list-style-type: none"> • Local SNA meetings • Informal surveys • Conversations • List strategies • Discuss strategies • Comparing products
40 minutes	Culminating Activity and Action Plan <ul style="list-style-type: none"> • Put it all together • Wrap Up
4 hours	Total Time

LESSON-AT-A-GLANCE

Training Introduction

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none">• Introductions	<ul style="list-style-type: none">• Introductions	
10 minutes	<ul style="list-style-type: none">• Training Overview• Pre-Assessment	<ul style="list-style-type: none">• Pre-Assessment	<ul style="list-style-type: none">• Pre-Assessment

INTRODUCTION

SHOW SLIDE: *Procurement of Lower-Sodium Foods*

SAY: Welcome to the *Procurement of Lower-Sodium Foods* training. The Institute of Child Nutrition would like to thank you for providing us with the opportunity to offer this sodium reduction virtual instructor-led training. It is our hope that you will gain the knowledge and skills for implementing sodium-reduction strategies into your school nutrition program.

This training is part of the *Shaking It Up! Small Changes Lead to Big Flavors* series. It provides the foundational knowledge and skills needed to reduce the amount of sodium in school meals while ensuring that meals are flavorful and satisfying for students.

In this introduction lesson, we are going to cover some general information before exploring how to use procurement strategies to procure lower-sodium products and ingredients.

First, let's begin by getting to know each other.

SHOW SLIDE: *Activity: Introductions***Activity: Introductions**

Materials: Mute or Unmute, Raise Hand, Chat Functions

Time: 5 minutes

Instructions: Instruct participants to use the mute/unmute or chat function to introduce themselves.

DO: Introduce yourself and other special guests. Be sure to state your name, title/credentials, and your experience in school nutrition and other child nutrition programs.

SAY: Please unmute and introduce yourself including your name, title/credentials, and your experience in school nutrition and other child nutrition programs.

DO: Encourage participants to respond. Allow participants time to unmute and answer or post in the chat.

FEEDBACK: Thank the participants for responding.

SHOW SLIDE: *Logistics*

SAY: To help ensure this training is a success, there are a few key things to keep in mind.

- ICN has some training ground rules as you can see on the screen. They are:
 1. Show up on Time
 2. Be Present
 3. Let Everyone Participate
 4. Listen with an Open Mind
 5. Think Before Speaking
 6. Attack the Problem Not the Person
- We will take a minimum of two breaks during this training. Please be sure to return on time, as starting and ending breaks on time will allow us to cover all the training information and activities within the time allotted. If you need to stretch or attend to a need at a different time, please feel free to do so. All that I ask is that you leave and return without disturbing the training.
- Feel free to ask any questions in the chat or use the raise hand function to get my attention. I will aim to answer all questions and share the information with the class before the end of this training. Although, I will try to answer questions throughout the training, some questions may require research or a longer answer than time allows. Any questions I cannot answer, I will forward to the ICN for further assistance.
- Throughout the training, I will be referring worksheets from the Shaking It Up! Series, additional resources, and handouts. These can also be found in your Participant's Workbook for this training.

Now that we have reviewed some basic logistical information, let's shift our focus to the training topic, sodium reduction.

SHOW SLIDE: *Background*

SAY: In January 2012, the USDA Food and Nutrition Service (FNS) published the final rule, *Nutrition Standards in the National School Lunch and School Breakfast Programs (77 FR 4088)*, that updated the meal patterns and nutrition standards for the National School Lunch Program (NSLP), the Seamless Summer Option (SSO), and the School Breakfast Program (SBP) to reflect the Dietary Guidelines for Americans. One provision of the updated nutrition standards required the gradual reduction in sodium content of school meals offered in the NSLP and SBP by meeting progressively lower-sodium targets.

On February 7, 2022, USDA FNS announced *Transitional Standards for Milk, Whole Grains, and Sodium (87 FR 6984)* to support the continued provision of nutritious school meals as schools respond to and recover from the pandemic. The final rule modified the proposed sodium standards by establishing Sodium Target 1 as the sodium limit for school lunch and breakfast in SY 2022–2023 and implementing a Sodium Interim Target 1A effective for school lunch beginning in SY 2023–2024. In 2024, USDA FNS announced the Child Nutrition Programs: Meal Patterns Consistent with the 2020-2025 Dietary Guidelines for Americans, which maintains the current sodium limits—Target 1A for lunch and Target 1 for breakfast—until June 30, 2027 and the associated reductions in lunch and breakfast starting on July 1, 2027.

USDA FNS has conducted studies to investigate the barriers and challenges School Food Authorities (SFAs) face when implementing sodium nutrition standards. In 2019, USDA FNS conducted the *Successful Approaches to Reduce Sodium in School Meals* study to examine the market availability of foods that meet the current and future sodium targets for school meal programs and to identify best practices in schools that are successfully meeting sodium targets. These training modules explore some of the strategies identified as useful in meeting the sodium targets.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [*Nutrition Standards in the National School Lunch and School Breakfast Programs \(77 FR 4088\)*](#), [*Transitional Standards for Milk, Whole Grains, and Sodium \(87 FR 6984\)*](#), [*Child Nutrition Programs: Meal Patterns Consistent With the 2020-2025 Dietary Guidelines for Americans, 7 C.F.R § 210, 215, 220, 225, 226 \(2024\)*](#), and [*Successful Approaches to Reduce Sodium in School Meals*](#)

SHOW SLIDE: *Sodium Reduction Virtual Workshop Series*

SAY: In response to the study's findings, the Institute of Child Nutrition (ICN) developed four virtual instructor-led training sessions to reach school nutrition directors, dietitians, and menu planners throughout the country. The trainings focus on sodium reduction through menu planning and analysis, procurement, staff training, and maintaining student satisfaction. The intended audience includes directors, dietitians, and menu planners operating heat-and-serve or hybrid (heat-and-serve/speed-scratch/scratch) models focused on reducing sodium in their menus.

Sodium Reduction VILT Series sessions consist of instruction on the subject, breakout discussion, and hands-on application. At the conclusion of the training, you will formulate action plans, including SMART goals, incorporating the gained knowledge into your nutrition program.

SHOW SLIDE: *Procurement of Lower-Sodium Foods*

SAY: *Procurement of Lower-Sodium Foods* is one of the four virtual trainings. This training focuses on obtaining lower-sodium products and increasing the use of local foods in school menus. The pre-procurement steps include identifying the products that need to be replaced, surveying neighboring school districts, and writing product specifications that facilitate procurement. The USDA Foods in Schools, USDA DoD Fresh Fruit and Vegetable Program, and the USDA Farm to School Grant Program provide resources for schools looking to increase the use of local foods. Strategies for leveraging these programs, collaborating with vendors, and developing criteria for comparing vendor products are also covered. Finally, participants will learn how to reduce the sodium content of school meals and how to develop an action plan to gradually produce lower-sodium school menus.

SHOW SLIDE: *Activity: Pre-Assessment***Activity: Pre-Assessment****Materials:** Link to Pre-Assessment**Time:** 5 minutes**Instructions:** Instruct participants to use the link in the chat or QR code on the screen to complete the Pre-Assessment.**SAY:** Before we begin exploring the first topic, let's assess what you already know about sodium in school meals and maintaining students' acceptance of lower sodium meals by completing a Pre-Assessment.**Instructor's Note:** Paste the link to the Pre-Assessment into the chat box.**DO:** Allow 5 minutes for participants to complete the Pre-Assessment.**Instructor's Note:** It is recommended that you take at least a 5 to 10-minute break for every hour of online learning. Plan breaks accordingly and based on your learners' needs.

LESSON-AT-A-GLANCE

LESSON 1: USDA FOOD PROGRAMS

Objective: Describe the pre-procurement steps to obtain lower-sodium products.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none"> Evaluate your menus Setting sodium limits Conducting market research 	<ul style="list-style-type: none"> List the pre-procurement steps to obtain lower-sodium products 	<ul style="list-style-type: none"> Procuring Lower-Sodium Products Checklist Paper or notetaking method of choice Pen/pencil

Objective: Describe the USDA Foods in Schools, USDA DoD Fresh Fruit and Vegetable Program, and the USDA Farm to School Grant Program.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none"> USDA Foods in Schools USDA DoD Fresh Fruits and Vegetable Program USDA Farm to School Grant Program 	<ul style="list-style-type: none"> Matching Activity to identify the program 	<ul style="list-style-type: none"> Paper or notetaking method of choice Pen/pencil

Objective: Recognize how to leverage USDA programs to increase lower-sodium foods in school menus.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none"> USDA Foods in Schools Available List USDA Foods in Schools Product Information Sheets 	<ul style="list-style-type: none"> Food for Thought reflection to identify USDA Foods to add to program 	<ul style="list-style-type: none"> Food for Thought handout Paper or notetaking method of choice Pen/pencil

Objective: Identify strategies to incorporate local foods into school meals.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none"> Identify local foods on menu Look for local options to replace current items Adjust menus and recipes Develop new menus and recipes 	<ul style="list-style-type: none"> Grow Your Local Foods Menu 	<ul style="list-style-type: none"> Grow Your Local Foods Menu Action Plan handout Paper or notetaking method of choice Pen/pencil

LESSON 1: USDA FOOD PROGRAMS

SHOW SLIDE: *USDA Food Programs*

SAY: Our first lesson is all about the USDA Food programs. In this lesson, we will cover the programs and how to effectively use them to procure products that are lower in sodium. Let's get started.

Objective: Describe the pre-procurement steps to obtain lower-sodium products.

SHOW SLIDE: *Working with Procurement Partners*

SAY: As a school nutrition operator, you may be responsible for procurement or support the process. Effectively communicating and collaborating with your procurement partners can help you plan and serve meals consistent with the meal patterns and dietary specifications AND appeal to your students.

Procuring lower-sodium foods for school meals is a process that requires open communication and collaboration among everyone in the school food supply chain. As the School Food Authority (SFA), you are responsible for the proper use of school nutrition program funds to provide nutritious foods to students. You (and/or your cooperative purchasing group) may source food from distributors, manufacturers, local producers, the USDA Foods in Schools Program (USDA Foods), and the USDA Department of Defense Fresh Fruit and Vegetable Program (USDA DoD Fresh).

SHOW SLIDE: *Where to start?*

SAY: Brokers, distributors, and manufacturers, collectively known as vendors, want your business and want to work with you. They want to know what products you are looking for and want to hear feedback regarding their products' quality and acceptance from students.

Let's take time to review the pre-procurement steps you need to take to obtain lower-sodium products from these vendors. The steps include:

- Prepare to speak with vendors ahead of time.
- Discuss your menu needs with vendors.
- Seek student input.

SHOW SLIDE: *Procurement Step 1: Prepare to Speak with Vendors Ahead of Time*

SAY: The first step you can take to make the most of your conversations with vendors is to prepare ahead of time. This means you must:

- Evaluate your menu,
- Set sodium goals, and
- Conduct market research.

Let's explore each of these in more detail.

SHOW SLIDE: *Pre-Procurement Step 1: Prepare to speak with vendors ahead of time by: Evaluating Your Menu*

SAY: Familiarize yourself with the sodium levels of your current products and recipes. Identify the highest-sodium contributors in your menu.

Use a cycle menu to help you analyze:

- The type and frequency of menu items you offer,
- Similarities among products needed for recipes, and
- Menu items and recipes that contribute the most sodium in a weekly menu.

A cycle menu allows you to “plug and play” menu items into different daily and weekly menus to see how they impact sodium totals.

SHOW SLIDE: *Pre-Procurement Step 1: Prepare to speak with vendors ahead of time by: Setting Sodium Limits*

SAY: Set the sodium levels of your current products and recipes as your initial maximum sodium limits. During each procurement cycle, substitute a subset of your highest-sodium contributors with those that are slightly lower in sodium. Use the new sodium levels as your new maximum sodium limits for the next procurement cycle. Let your brokers and vendors know that you will not consider any products above your maximum sodium limits. This approach reduces your weekly sodium totals gradually over time. Your students will be less likely to notice any taste differences.

SHOW SLIDE: *Pre-Procurement Step 1: Prepare to speak with vendors ahead of time by: Conducting Market Research*

SAY: Products that are high in sodium are typically commercially processed, packaged, and prepared foods. The range of sodium in these products can be quite large. Obtaining the information you need about lower-sodium product options is an ongoing effort as it can become frequently outdated due to:

- Product information not being readily available,
- Varying product ingredients and formulations by different manufacturers, and
- Rapidly changing manufacturing processes.

When engaging in market research, it's important to know WHOM to reach out to and identify how they can help with procuring lower-sodium products. What do they have to offer?

SHOW SLIDE: *Pre-Procurement Step 2: Discuss Your Menu Needs With Vendors*

SAY: After evaluating your menu, setting sodium limits, and conducting market research, you are ready to speak with your brokers or vendors. Share your findings from your market research and ask if they know of low-sodium products that might fit your menu needs. Brokers and vendors can help find lower-sodium versions of products, or alternative lower-sodium foods similar to those on your current menu. After identifying lower-sodium product options, compare the sodium amount, serving size, unit price, and meal contribution of each product.

SHOW SLIDE: *Product Substitution*

SAY: If you are looking to substitute current menu items with similar lower-sodium versions, be sure to provide the current products':

- Name
- Description
- Sodium amount
- Serving size
- Crediting information

This information is needed to analyze and assess the differences between your current products and potential products.

SHOW SLIDE: *Pre-Procurement Step 3: Seek Student Input*

SAY: Before substituting a menu item for a lower-sodium product, it's essential to seek student input. The lowest cost lower-sodium product may not be the tastiest option for your students. If your students won't eat it, it's not a suitable replacement.

Taste-testing activities and surveys can provide you with valuable feedback and help gain student acceptance of lower-sodium menu items. Utilize vendors to support you with taste testing. Generally, you can request a few product samples from your vendors at no cost—you just need to ask. They may even want to be onsite the day of testing to prepare samples for serving students in the serving line or eating area.

Check out Team Nutrition's [Popular Events Idea Booklet](#) to help you plan a taste-testing event for elementary or middle school students. Another great resource for getting high school students involved is ICN's [Engaging Students in Menu Development](#) worksheet.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Popular Events Idea Booklet](#) and [Engaging Students in Menu Development](#)

SHOW SLIDE: Activity: Procuring Lower-Sodium Products Checklist

Activity: Procuring Lower-Sodium Products Checklist

Materials: *Procuring Lower-Sodium Products Checklist*, Mute/Unmute, Raise Hand, Chat functions

Time: 5 minutes

Instructions: Instruct participants to use the mute/unmute or chat function to list and describe the pre-procurement steps. Refer participants to the handout “Procuring Lower-Sodium Products Checklist.”

SAY: We have covered the pre-procurement steps, so let's take time to review them. Using the mute/unmute or chat function, let's list and describe the pre-procurement steps. The *Procuring Lower-Sodium Products Checklist* handout can help to guide our discussion.

Instructor's Note: Remind participants that the *Procuring Lower-Sodium Products Checklist* handout can be found in the Participant's Workbook.

DO: Encourage participants to respond. Allow participants time to unmute and answer or post in the chat. After participants have responded, click to display the feedback on the slide and summarize.

FEEDBACK: Pre-procurement steps:

1. Prepare to Speak with Vendors Ahead of Time
 - a. Evaluate your menu
 - b. Set sodium goals
 - c. Conduct market research
2. Discuss Your Menu Needs With Vendors
3. Seek Student Input

Objective: Describe the USDA Foods in Schools, USDA DoD Fresh Fruit and Vegetable Program, and the USDA Farm to School Grant Program.

SHOW SLIDE: *USDA Foods Program*

SAY: Now that we know the pre-procurement steps, let's discuss the food distribution programs. The U.S. Department of Agriculture, Food and Nutrition Service (USDA, FNS) offers USDA Foods in Schools (USDA Foods), which includes the USDA Department of Defense Fresh Fruit and Vegetable Program (USDA DoD Fresh), to financially support School Food Authorities (SFAs) through purchases of 100% American grown and produced foods for use in school nutrition programs. These programs can also help you meet the School Breakfast Program (SBP) and National School Lunch Program (NSLP) meal patterns and dietary specifications, including sodium nutrition standards. Also, USDA, FNS Office of Community Food Systems awards annual, competitive grants (up to \$100,000) that support farm to school activities. They are designed to assist eligible entities in implementing farm to school programs that improve access to local foods in schools.

SHOW SLIDE: *USDA Foods in Schools*

SAY: USDA Foods in Schools is a program that provides nutritious and domestically produced food to schools. The program offers a variety of food items, including fruits, vegetables, meats, grains, and dairy products. Schools can use these foods to prepare meals for students, which helps promote healthy eating habits and supports local agriculture.

USDA purchases U.S. grown, processed, and packaged foods for nutrition assistance programs, including school meals. More than 200 USDA Foods products, including fruits, vegetables, grains, and meats/meat alternates that meet strict nutrition quality and food safety requirements, are available to order. USDA Foods are available through three ordering options: direct delivered USDA Foods, bulk USDA Foods that can be sent to processors, or USDA DoD Fresh.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [*USDA Foods in Schools*](#)

SHOW SLIDE: *USDA DoD Fresh*

SAY: The USDA DoD Fresh Fruit and Vegetable Program is a partnership between the United States Department of Agriculture (USDA) and the Department of Defense (DoD) to provide fresh fruits and vegetables to schools and Indian Tribal Organizations (ITOs). This program aims to improve students' diets by increasing their consumption of fresh produce and to promote healthy eating habits. The program also supports local farmers and helps to reduce food waste.

A partnership between USDA and DoD provides domestically grown, whole, and pre-cut fresh fruits and vegetables for use in school meals as USDA Foods. The DoD Defense Logistics Agency (DLA) leverages its buying power by contracting with produce vendors for weekly deliveries of a wide variety of produce to schools and other locations.

SHOW SLIDE: *Farm to School Grant Program*

SAY: The USDA Farm to School Grant Program is a competitive grant program that provides funding to schools, school districts, and other eligible organizations to help them establish or expand their farm-to-school programs. The program aims to increase access to locally sourced foods in schools, improve children's nutrition, and provide education on agriculture and nutrition. The grants can be used for a variety of purposes, including purchasing equipment, developing partnerships with local farmers, and providing nutrition education.

Currently, schools and school districts that participate in the National School Lunch Program (NSLP) are eligible to apply to one of two available tracks (Turnkey, Implementation) to initiate or expand farm to school efforts. The Turnkey grant would require you to select and complete a specific project and associated activities outlined by FNS. An Implementation grant provides an opportunity for you to propose projects that support broader, original ideas that align with the USDA Farm to School Grant Program goals and objectives. USDA releases a request for applications (RFA) in the fall and announces awards in the early summer. Visit the USDA [Farm to School Grant Program's](#) website for more information.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Farm to School Grant Program's](#) website

SHOW SLIDE: Activity: USDA Foods Programs**Activity: USDA Foods Programs****Materials:** Poll, Mute or Unmute, Raise Hand, Chat Functions**Time:** 5 minutes**Instructions:** Instruct participants to answer the polling questions and use the mute/unmute or chat function to discuss.**SAY:** We have discussed USDA Foods, USDA DoD Fresh, and Farm to School Grants. Given the description, which program does this describe? Select the correct answer to the poll question.**DO:** Launch the poll question. Encourage participants to respond. Allow participants time to answer. After participants have responded, ask if they have any questions about the programs.**FEEDBACK:** Poll questions:

1. Provides domestically grown, whole, and pre-cut fresh fruits and vegetables for use in school meals.
 - a. USDA Foods in Schools
 - b. USDA DoD Fresh
 - c. Farm to School Grants

2. A competitive grant program that provides funding to schools, school districts, and other eligible organizations to help them establish or expand their farm-to-school programs.
 - a. USDA Foods in Schools
 - b. USDA DoD Fresh
 - c. Farm to School Grants

3. Provides nutritious and domestically produced food to schools. The program offers a variety of food items, including fruits, vegetables, meats, grains, and dairy products.
 - a. USDA Foods in Schools
 - b. USDA DoD Fresh
 - c. Farm to School Grants

Objective: Recognize how to leverage USDA programs to increase lower-sodium foods in school menus.

SHOW SLIDE: *How to Participate in USDA Foods Including USDA DoD Fresh*

SAY: To get started, contact your State Distributing Agency (SDA), which administers USDA Foods including USDA DoD Fresh at the State level. Go to the [USDA, FNS Contacts](#) page and select your respective state and the program USDA Foods in Schools in the drop-down boxes. Select the “Contact Info” button for a contact name, number, and email address, and write the contact details in the space provided for reference.

Each year, your SDA determines the value you are entitled to spend on USDA Foods direct delivery or further processing or allocation to USDA DoD Fresh. Your planned assistance level (PAL) is based on your SFA's prior year reimbursable NSLP meals served, multiplied by the annual Federal assistance per meal rate. SDAs work with

SFAs to:

- Manage and fully utilize your USDA Foods entitlement dollars
- Allocate a portion of your USDA Foods entitlement dollars to USDA DoD Fresh
- Decide which USDA Foods products will be offered in your state for the upcoming school year.

Each SDA manages these programs differently. Refer to your SDA for state-specific details and deadlines.

Incorporating USDA Foods products and USDA DoD Fresh produce in your menu will help you stay within your budget and meet the sodium targets. Visit [USDA Foods in Schools](#) and [USDA DoD Fresh Fruit and Vegetable Program](#) for more information, and contact your SDA today.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [USDA, FNS Contacts](#) page, [USDA Foods in Schools](#) and [USDA DoD Fresh Fruit and Vegetable Program](#)

SHOW SLIDE: *Using USDA Foods to Lower Sodium in School Meals*

SAY: You can substitute many commercial food products with USDA Foods to help lower the overall sodium content of your weekly menu. All USDA Foods processed vegetable and bean products are low sodium or no salt added, often making them lower in sodium than their commercial equivalents. USDA Foods has also reduced the sodium content in many of its cheese, meat, poultry, and fish products in recent years.

SHOW SLIDE: *USDA Foods Available List*

SAY: You can find USDA Foods products available for the upcoming school year on the [USDA Foods Available List](#) posted under the subheading “USDA Foods in Schools (USDA-FIS).” The list is categorized by food group and indicates vegetable subgroups and whole grain or whole grain-rich products. Low sodium and no salt added products are clearly labeled.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [USDA Foods Available List](#)

SHOW SLIDE: *USDA Foods Product Information Sheets*

SAY: [USDA Foods Product Information Sheets](#) provide a product description, crediting/yield information, nutrition information, culinary tips and recipes, food safety, and allergen information for all USDA Foods. Products are categorized by food type (fruit, vegetables, grains, meats/meat alternates, and other foods) and listed alphabetically. You can use the included Nutrition Facts label to compare sodium amounts between commercial and USDA Foods products.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [USDA Foods Product Information Sheets](#)

SHOW SLIDE: *Using USDA DoD Fresh to Lower Sodium in School Meals*

SAY: Fresh produce naturally has very little or no sodium at all. Incorporating more fresh produce in the school menu—either raw, frozen, cooked, and seasoned with herbs and spices, or prepared in a recipe—can help reduce the amount of sodium consumed in the meal.

Refer to the “Snapshot of USDA DoD Fresh Produce” handout on the *Utilizing USDA Foods and USDA DoD Fresh Programs*, it provides a snapshot of the different types of U.S. grown fresh produce you can order when your SFA participates in USDA DoD Fresh. Many varieties, package sizes, and forms of produce (mixes, snack packs, etc.) are available. Keep in mind that fresh produce availability varies by season, region of the country, and vendor. You can even request that your vendor add specific produce items to the catalog, but they must be grown in the U.S. and be fair and reasonably priced.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Utilizing USDA Foods and USDA DoD Fresh Programs](#) worksheet

SHOW SLIDE: Activity: Food for Thought**Activity: Food for Thought**

Materials: *Food for Thought* handout, pen/pencil, Breakout Rooms, Mute/Unmute, Raise Hand, Chat functions

Time: 10 minutes

Instructions: Divide participants into groups for Breakout Rooms of 3 participants each. Instruct participants to use the *Food for Thought* handout to complete the activity. Allow 10 minutes in the breakout rooms. End the Breakout Rooms. Instruct participants to use the mute/unmute or chat function to share.

SAY: Time to practice! Using the *Food for Thought* handout think about ways to incorporate USDA Foods into your program. You will share this in your Breakout Room and determine ways to implement it into your program.

Instructor's Note: Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.

SAY: Who would like to share?

DO: Encourage participants to respond. Allow participants time to unmute and answer or post in the chat.

FEEDBACK: Thank the participants for sharing their ideas.

SAY: Offering a variety of produce in your menu encourages your students to eat it, which can ultimately help reduce the amount of sodium consumed in a meal.

Objective: Identify strategies to incorporate local foods into school menus.

SHOW SLIDE: Incorporating Local Foods in School Nutrition Programs

SAY: You are in a unique position as a school nutrition operator to connect your school district with local foods that are minimally processed. Using more fresh fruits, vegetables, and meats from local farmers and producers can also support your efforts to reduce the sodium content of school meals. Procurement options for local foods vary based on your school district's proximity to where the food is grown or raised, the growing season, and the availability of food processors and distributors. There are different strategies you can use to incorporate local foods into your school breakfast and lunch menus. Let's explore these further.

SHOW SLIDE: *Before Incorporating Local Foods*

SAY: Before you can incorporate local foods into your school breakfast and lunch menus, you need to complete two key steps:

- Define what “local” means to your school or school district.
- Find out what local products are available to you and when they are in season.

SHOW SLIDE: *Defining Local*

SAY: Define what “local” means to your school or school district. “Local” may be defined as a certain mile radius from your school or school district. It may also be defined as your county (or include surrounding counties) or your state (or include surrounding states). Consider that the definition may differ depending on the food product or may change throughout the year due to seasonal availability.

SHOW SLIDE: *Local Availability Resources*

SAY: Find out what local products are available to you and when they are in season. Consider using the following resources:

- [Land-Grant University-Extension](#)
 - In each state, a network of local agricultural agents and educators, including experts on local food systems, provide publications, programs, and services to the public through their land-grant university-extension service. Find your land-grant university-extension service using the link above.
- State or Region-Specific Seasonality Charts
 - Many state departments of agriculture or nonprofit organizations produce visual representations of what foods are available locally and seasonally in a state or specific region.
 - SNAP-Ed offers a [Seasonal Produce Guide](#) to get you started. Seasonal produce specific to your area will vary by weather and growing conditions, so be sure to check out your state or region-specific seasonality chart.
- [USDA Census of Agriculture](#)
 - USDA's National Agricultural Statistics Service (NASS) surveys all U.S. farmers every five years. Detailed information about agricultural production in each state and county is available online.
- [USDA Farm to School Census](#)
 - The Farm to School Census reports which school districts purchase local foods and what they purchase.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Land-Grant University-Extension](#), [Seasonal Produce Guide](#), [USDA Census of Agriculture](#), and [USDA Farm to School Census](#)

SHOW SLIDE: *Strategies to Grow Your Local Foods Menu*

SAY: Once "local" is defined and you identify local products that are available to you, it is time to grow your local foods menu. Cultivating your menu and recipes with locally procured fresh fruits, vegetables, and meats can help replace higher sodium menu items and recipes. Let's consider a few strategies that may help you cultivate your menu and recipes.

SHOW SLIDE: *Identify local foods that are already on the menu.*

SAY: Identify local foods that are already on the menu. Let your distributor know your definition of “local”; ask which foods are procured locally. Milk is often procured from local dairies.

SHOW SLIDE: *Look for local foods to replace what you already offer on the menu.*

SAY: Look for local foods to replace what you already offer on the menu. Aim to procure agricultural commodities that are grown in your state or region. For example if you are a Michigan school district, are your apples from a local orchard? Consider using foods grown or harvested by your school district, such as from an edible school garden. Be sure to check with your state and local health departments on whether school-grown foods can be incorporated for consumption on a school menu.

SHOW SLIDE: *Adjust menus and recipes to incorporate local foods.*

SAY: Adjust menus and recipes to incorporate local foods. Fresh fruits and vegetables are a logical starting point. They are naturally lower in sodium and can be served with little to no preparation beyond washing (and cutting). A salad bar is a friendly way to offer various local fruits and vegetables. Expand your local foods beyond fruits and vegetables. Consider ways to incorporate locally produced meat, poultry, eggs, cheese, grains, beans, or seafood while being mindful of the sodium content. Ensure your local foods contain relatively the same or lower amounts of sodium.

SHOW SLIDE: *Develop new menus and recipes to highlight local foods and ingredients.*

SAY: Develop new menus and recipes to highlight local foods and ingredients. Consider promoting one local food product or ingredient every month through a “Harvest of the Month” program. Check out Montana’s “Harvest of the Month” program for inspiration.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: Montana's [Harvest of the Month](#) program

SHOW SLIDE: Activity: *Grow Your Local Foods Menu Action Plan***Activity: *Grow Your Local Foods Menu Action Plan***

Materials: *Grow Your Local Foods Menu Action Plan* handout, Breakout Rooms, Mute/Unmute, Raise Hand, Chat functions

Time: 15 minutes

Instructions: Divide participants into groups for Breakout Rooms of 3 participants each. Instruct participants to use the handout *Grow Your Local Foods Menu Action Plan* handout to complete the activity. Allow 10 minutes in the breakout rooms. End the Breakout Rooms. Instruct participants to use the mute/unmute or chat function to share

SAY: As you consider incorporating local foods into your school menu, it can be helpful to set a goal and develop an action plan. Use the handout *Grow Your Local Foods Menu Action Plan* as a guide for your own local foods goal and plan for the next school year. Please note the provided example includes only some of the milestones you would need to reach to achieve the stated goal. Share in your Breakout Room.

Instructor's Note: Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.

SAY: Who would like to share?

DO: Encourage participants to respond. Allow participants time to unmute and answer or post in the chat.

FEEDBACK: Thank the participants for sharing their ideas.

SHOW SLIDE: *Lesson 1 Summary*

SAY: To wrap up this lesson, we learned that:

- Pre-procurement steps are:
 1. Prepare to Speak with Vendors Ahead of Time
 - a. Evaluate your menu
 - b. Set sodium goals
 - c. Conduct market research
 2. Discuss Your Menu Needs With Vendors
 3. Seek Student Input
- USDA Foods in Schools provides domestically produced food to schools.
- DoD Fresh Fruit and Vegetable Program provides fresh produce to schools.
- USDA Farm to School Grant Program funds farm-to-school programs to improve children's nutrition and education on agriculture.
- Using more fresh fruits, vegetables, and meats from local farmers and producers can also support your efforts to reduce the sodium content of school meals.

DO: Encourage participants to take a 5-minute break before Lesson 2.

LESSON-AT-A-GLANCE

LESSON 2: COOPERATIVE PURCHASING GROUPS

Objective: Identify the tools used to form a cooperative purchasing group.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> Tools to form a cooperative purchasing group 	<ul style="list-style-type: none"> Talking Tools 	<ul style="list-style-type: none"> Paper or notetaking method of choice Pen/pencil

Objective: Identify the tools needed to make an informed decision about joining a cooperative purchasing group.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> Tools to join a cooperative purchasing group 	<ul style="list-style-type: none"> Examine Your SFA's Needs 	<ul style="list-style-type: none"> Examine Your SFA's Needs handout Evaluate and Compare Features of Cooperative Purchasing Groups handout Paper or notetaking method of choice Pen/pencil

Objective: Summarize the advantages and disadvantages of procuring through a cooperative purchasing group.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> Advantages Disadvantages 	<ul style="list-style-type: none"> Create a Pro/Con List 	<ul style="list-style-type: none"> Paper or notetaking method of choice Pen/pencil

LESSON 2: COOPERATIVE PURCHASING GROUPS

SHOW SLIDE: *Cooperative Purchasing Groups*

SAY: Our second lesson is all about cooperative purchasing groups. In this lesson, we will discuss how to poll neighboring districts, learn how to form a cooperative purchasing group, determine if you should join a cooperative purchasing group, and summarize the advantages and disadvantages of procuring through a cooperative purchasing group. Let's get started.

SHOW SLIDE: *Purchasing Agreements*

SAY: School food authorities (SFAs) can enter into different types of purchasing agreements to procure the products and services needed to operate their school nutrition programs. If you're having difficulty identifying, procuring, and receiving affordable lower-sodium products and other products and services for your program operations, consider joining a cooperative purchasing group (CPG).

SHOW SLIDE: *Cooperative Purchasing*

SAY: In school nutrition, cooperative purchasing is an agreement to collectively pool the purchasing power of SFAs to competitively procure some or most of the products and services needed to operate a school nutrition program. Most commonly, this agreement is between a group of SFAs. Cooperative purchasing is particularly advantageous for small- to medium-sized SFAs needing volume cost savings. SFA CPGs use their collective purchasing power and expertise to reduce food, supply, labor, and administrative costs. In addition, SFA CPGs are used to improve the quality and types of products (including low-sodium!) and services available to member school nutrition programs. SFA CPGs operate using procurement procedures that comply with the most restrictive Federal, State, and local requirements.

Although rare, a cooperative purchasing agreement may be between a Child Nutrition Program (CNP) State agency and their respective SFAs. In this case, the State agency procures products and services on behalf of their SFAs. SFAs are then allowed to purchase from the CNP State agency's procured sources without further competition if the State agency follows the Federal procurement regulations. You can research to see if one exists that you can join. If not, do not worry, we will learn how to create one.

Objective: Identify the tools used to form a cooperative purchasing group.

SHOW SLIDE: *Form a Cooperative Purchasing Group*

SAY: A school district has the authority to establish its own system to procure goods and services, as long as it follows the Federal government's procurement guidelines. Generally, one SFA will take the lead to form a cooperative purchasing group. Before forming a cooperative purchasing group, the following should be considered:

- Review Federal guidelines
- Conduct initial research
- Conduct a member-user survey
- Analyze the financial needs of the purchasing group
- Conduct a meeting with potential members
- Develop a business plan

We are going to briefly discuss each. However, the Participant's Workbook included with the ICN training, [Procurement of Foods: Cooperative Purchasing Groups](#), provides more detailed information about CPGs. It also outlines the next steps to take and questions to ask when thinking about joining or forming a CPG.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Procurement of Foods: Cooperative Purchasing Groups](#)

SHOW SLIDE: *Review Federal Guidelines*

SAY: All procurement transactions must be conducted in a manner that provides full and open competition consistent with the Federal standards found in the Program and government-wide regulations at the links in the chatbox. The guidelines exist to ensure that taxpayer dollars are used prudently and judiciously and that there is fair competition among vendors for Federal dollars.

Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [7 CFR 210.21](#) and [2 CFR 200.318-326](#)

SHOW SLIDE: *Conduct Initial Research*

SAY: SFAs could take the following steps to determine interest for a cooperative purchasing group:

- Determine the level of interest in starting and supporting a cooperative purchasing group by forming a leadership group of interested directors.
- Contact local directors first by phone and briefly discuss the possibility of developing a cooperative purchasing group.
- Invite potential members and outside advisers to a general meeting. Ask the directors if they will be willing to complete a survey to see if their interests warrant proceeding to the next step.

SHOW SLIDE: *Conduct Member-User Survey*

SAY: Conduct a member-user survey to determine if there will be sufficient members to support the functionality of a cooperative purchasing group. The feedback from the survey serves as a guide for the lead committee in determining their next plan of action.

A formal survey is best for estimating potential group membership. Survey questions should ascertain the level of support in terms of products desired, possible business volume, and if the financial commitment is sufficient to organize and successfully operate the group. Potential members may be concerned about providing confidential information. Establish rapport and build trust with members by discussing the survey in a phone conversation, at local SNA chapter meetings, or a neutral location.

SHOW SLIDE: *Seek Advisors*

SAY: Some cooperative purchasing groups decide to seek expertise from outside advisors. An outside advisor may be a representative from your State agency, officers from cooperative purchasing groups in other States, and/or potential members' legal or purchasing departments. Before inviting any of the advisors who will travel to speak to your general meeting, ascertain if they will charge a fee for their time or require reimbursement for travel expenses.

SHOW SLIDE: *Analyze the Financial Needs of the Purchasing Group*

SAY: As with any new venture, carefully analyzing the strengths and weaknesses of the endeavor contributes to an objective and rational approach in the decision-making process. Understanding, in advance, the costs to form and maintain a cooperative purchasing group will allow for effective communication of the economic value throughout its lifecycle.

To determine if forming a group will be sustainable, conduct a feasibility analysis, which helps to identify and evaluate potential barriers or adverse conditions that may preclude a beneficial outcome.

During the review process, identify suitable markets, sources of supply, potential vendors, and their requirements. Calculate costs, such as start-up fees, member investment fees, attorney fees, expert advisor fees, printing and mailing costs, and administration costs. An important part of the analysis is to identify the volatility of business fluctuations in volume or operating costs. Examples of volatility include adverse weather affecting product sales, wage rates, operating efficiencies, and interest rates.

SHOW SLIDE: *Conduct a Meeting with the Lead Committee*

SAY: Network with local SFAs and identify members to serve on a lead committee that is responsible for planning which products and brands to pursue in developing purchase agreements with suppliers. Committee members are key stakeholders who will guide the development of the strategic plan and will support the vision and mission of the group.

The lead committee should hold a meeting with the final action being a vote to determine whether or not to continue with the establishment of a cooperative purchasing group. The leadership group should select a presiding officer who can conduct a business meeting. Sometimes an advisor can act as chair or help answer questions.

Encourage members to express procurement needs. Allow adequate time to review terminology, discuss the results of the member-user survey, and communicate:

- the operations,
- advantages,
- disadvantages,
- possible risks,
- benefits, and
- limitations of developing a cooperative purchasing group.

SHOW SLIDE: *Seek Assistance While in Preparation Stage*

SAY: Economic need is fundamental to the formation and operation of any cooperative purchasing group. In preparation for developing the detailed business plan, the lead committee should seek assistance from their State agency, legal authorities, and others who have actively participated in the business of group purchasing operations. Their help and assistance are crucial during the business plan analysis and development.

After determining if the projected initial investment is within the financial capabilities of its members, the new cooperative purchasing group should initially limit services to avoid unnecessary costs. Once the program is up and running successfully, additional services may be added.

SHOW SLIDE: *Develop an Agreement*

SAY: The next step is to develop an acceptable contractual agreement for and among the member SFAs. In this context, acceptable means it contains language that makes the contractual agreement mutually beneficial and competitive, though it may not be perfect for everyone.

In developing an acceptable agreement, the SFA should consider the following:

- Consider the needs of all potential member SFAs.
- Develop fair and accurate forecasted quantities and specifications for all products and services. This is essential to ensure the success of all solicitations.
- Develop a mutually agreeable list of products to be purchased based on the menus of potential member SFAs. Ideally, this would be an exercise in merging existing product lists and comparing quality of items that do not overlap. Consolidating like products is essential to obtaining the best prices. Conduct taste tests to get consensus.
- Establish policies and procedures to govern the operations of the group within the constraints of all applicable laws and regulations of each potential member SFA.
- Maintain a clear and appropriate line of communication between member SFAs and the group, potential vendors, and manufacturers.
- Be familiar with the Federal Procurement Regulations.

SHOW SLIDE: Activity: Tips for a Successful Meeting**Activity: Tips for a Successful Meeting****Materials:** Breakout Rooms, Mute/Unmute, Raise Hand, Chat functions**Time:** 15 minutes**Instructions:** Divide participants into groups for Breakout Rooms of 3 participants each. Instruct participants to identify and discuss the factors that contribute to a successful meeting when determining whether or not to continue with the establishment of a cooperative purchasing group or join one. Allow 10 minutes in the breakout rooms. End the Breakout Rooms. Instruct participants to use the mute/unmute or chat function to share**SAY:** We have discussed how to have a successful meeting to determine whether or not to continue with the establishment of a cooperative purchasing group or join one. In your Breakout Room, you will identify and discuss the factors that contribute to a successful meeting.**Instructor's Note:** Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.**ASK:** Who would like to share?**DO:** Allow participants time to share their answers. Thank the participants for sharing.**FEEDBACK:** The following are tips for conducting a successful meeting.

- Send out meeting notices, logistical information, and reminders in a timely manner.
- Prepare an agenda, sign-in sheet, and written handouts.
- Be as prepared as possible by understanding all the issues to be discussed regarding the formation of purchasing groups and the interests of each party.
- Assign an individual to lead the meeting to ensure minimal agenda deviation.
- Begin and end the meeting on time.
- Ask someone to take copious notes.
- Introduce all parties in the room.
- Provide sample resources.
- Encourage prospective members to ask questions and allow plenty of time for discussion.
- Provide follow-up to outstanding issues in a timely manner.
- Establish day, time, and location for next meeting.

Objective: Identify the tools needed to make an informed decision about joining a cooperative purchasing group.

SHOW SLIDE: *Join a Cooperative Purchasing Group*

SAY: Different SFAs have different needs, so it is important to determine if a cooperative purchasing group can satisfy the unique needs of an SFA. Some SFA directors fear that they might lose control of their program if they join a cooperative purchasing group. You should not lose control of your program. As a member of a group, you should have an equal voice in decisions. However, in order to obtain the cost savings associated with the group, the group operates as one and some concessions need to be made by all.

SHOW SLIDE: *Purchasing Group Application*

SAY: You will be asked to complete an application or agreement for participation in the cooperative purchasing group. The application or agreement will contain the following, at a minimum:

- applicant's request to become a member,
- authorized signature of the applicant's SFA,
- statement of group's acceptance of the applicant,
- authorized signatures of the group president and secretary, and
- statement of the intent and duty of the member.

SHOW SLIDE: *Factors to Consider Before You Join*

SAY: You will be expected to be a member in good standing. Your particular time commitments, money, and expertise should be clearly spelled out in any agreements made and considered when joining a cooperative purchasing group. When all members do not fully participate, they are subject to the decisions of the members who do participate. After you have evaluated your SFA's needs, there are a number of factors to consider when deciding to join a cooperative purchasing group. Let's discuss some of those factors.

SHOW SLIDE: *Costs*

SAY: Do you consider your current food costs to be higher than expected, or do you have sufficient volume of purchases by yourself to keep costs low? Many purchasing groups charge a fee for administrative overhead. Will this fee offset any cost savings you have? If you are considering joining an existing CPG, be sure to calculate and compare the cost of procuring through the CPG to the cost of procuring on your own. Fees may offset the potential savings of increased purchasing power. Your cost analysis must consider: CPG fees + CPG cost per purchase unit of food product vs. non-CPG cost per purchase unit of food product.

SHOW SLIDE: *Menus*

SAY: You will want to look at your menus and forecast your needs. Many SFAs have discovered they spend approximately 80% of their food budget on 20% of the menu items. If your SFA's high-volume menu items are included on the purchasing group's solicitation specifications, it may be advantageous for your SFA to consider participating in the cooperative purchasing group.

SHOW SLIDE: *Delivery Schedules and Storage Capacity*

SAY: Some of the cost savings realized by purchasing groups come from reducing the frequency of deliveries from vendors, meaning a higher quantity of food being delivered to your schools less frequently. Do you have the storage capacity to accept these larger quantities? The number of deliveries and delivery locations significantly impact pricing. Belonging to a CPG raises the possibility of receiving larger and less frequent deliveries, which is more cost-effective for the group. Check your dry and cold storage spaces to see if you can accommodate an increase in delivery volume.

SHOW SLIDE: *Local Regulations*

SAY: Are there any unique local regulations that might inhibit your ability to participate in a purchasing group? For instance, your city or county may have a more restrictive small purchase threshold than in areas of other SFAs participating in the purchasing group. The group may not be willing to reduce its small purchases to accommodate your threshold.

SHOW SLIDE: *Group Costs*

SAY: What are the costs associated with participating in the cooperative purchasing group? It is important to research all costs associated with membership, e.g. administrative fees, membership fees, additional delivery fees, and any penalties. You must also analyze and compare existing costs for commercial foods and supplies.

Likewise, it is important to identify whether the quality of menu items will meet or exceed your current standards. When exploring a CPG, ask the Group's officers or designated representative about membership fees and other requirements (that may incur additional costs) to participate.

SHOW SLIDE: *Legal Responsibilities*

SAY: As with any legally signed document, agreements are binding. You should check with your district's business office and legal counsel for the appropriate protocol before signing the agreement. It is also important to understand any additional fees or requirements in case of termination of the agreement.

SHOW SLIDE: *Training*

SAY: This training should help answer your general questions about cooperative purchasing groups. If you need additional training, you may want to contact other members of the purchasing group, check with your CN State agency, your local SNA chapter, or the Institute of Child Nutrition for information. You may find that your district or state's legal counsel and purchasing office may also be helpful.

SHOW SLIDE: *Farm to School/Local Foods*

SAY: Many cooperative purchasing groups will buy unprocessed, locally-grown or locally-raised agricultural products using the geographic preference option. When this happens, the preference must be specified in the solicitation and contract in addition to the definition of the local area that will receive the geographic preference. When considering different purchasing groups, review the solicitation and contract to determine if locally grown or locally raised agricultural products are available and how the local area is defined.

SHOW SLIDE: *Rebates*

SAY: When cost-reimbursable contracts are awarded, the cooperative purchasing group has to set up a structure to ensure that each SFA receives its allocable portion of rebates, discounts, and credits. This allocation should be determined based on the SFA's purchase volume in relation to the total volume purchased. The group must report these to each member SFA.

Cost-reimbursement contracts are contracts where the contractor is reimbursed for the actual costs incurred in performing the work, plus a fee or profit margin. Cost-reimbursement contracts are often used in government programs, including school lunch programs, to ensure that vendors are reimbursed for their allowable costs incurred in providing goods or services. In the context of a school lunch program, a cost-reimbursement contract might be used to hire a food service management company to supply meals to schools.

SHOW SLIDE: *Small Vendors*

SAY: Government-wide regulations require that affirmative steps must be taken when possible to use small, minority, and women's business enterprises. Some strategies to assure this include placing qualified small and minority businesses and women's business enterprises on solicitation lists; assuring such businesses are solicited whenever they are potential sources; dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation; and establishing delivery schedules, which encourage their participation.

Cooperative purchasing involves multiple government agencies or entities coming together to collectively procure goods and services. In summary, the information provided highlights the necessity for government entities engaged in cooperative purchasing to be proactive in promoting diversity and inclusion within their procurement processes. This ensures that a wider range of suppliers, including small, minority, and women-owned businesses, have the opportunity to participate in cooperative contracts, aligning with broader government objectives for inclusive economic practices.

SHOW SLIDE: *Menu Items*

SAY: There are opportunities for cooperative purchasing groups to procure new and/or a variety of menu items. To comply with procurement regulations, all procurement transactions must be conducted in a manner that maximizes full and open competition. This means using the appropriate procurement method to acquire new products and services. While new products appear on the market all the time, new items must be competitively procured using the applicable method.

SHOW SLIDE: *Legal Counsel*

SAY: The legal requirements of cooperative purchasing groups differ around the country. It is highly recommended to seek legal counsel familiar with State statutes on cooperative agreements. An attorney assists in the preparation of the organization's guiding documents; checks the legality of written agreements, solicitations, and contracts; may assist in the development of capitalization plans; financial decisions; and identifying ongoing issues that may be identified if retainer services are included in a competitively procured contract. Even after the cooperative is operating, if not already done, an attorney should be retained to help ensure the cooperative conforms to applicable laws.

SHOW SLIDE: *Ask Questions*

SAY: It is also important to reach out to other organizations in the area to assist you in this decision-making process. Some of the organizations to consider are:

- CNP State agency
- Professional organizations such as local chapter of SNA
- SFAs who are participating in a cooperative purchasing group

SHOW SLIDE: *Activity: Examine Your SFA's Needs*

SAY: Depending on the SFA's needs and the scope of the purchasing groups, the SFA may decide to join more than one type of cooperative purchasing group. In the next activity, you will have a few minutes to assess your SFA's needs.

Activity: *Examine Your SFA's Needs*

Materials: *Examine Your SFA's Needs* handout, Mute/Unmute, Raise Hand, Chat functions

Time: 5 minutes

Instructions: Instruct participants to use the handout *Examine Your SFA's Needs* to assess some of their SFA's needs before joining a group purchasing entity.

SAY: Using the handout *Examine Your SFA's Needs*, assess some of your SFA's needs before joining a group purchasing entity.

Instructor's Note: Remind participants that the *Examine Your SFA's Need* handout can be found in the Participant's Workbook.

DO: Allow participants 5 minutes to complete the worksheet. Allow participants time to share their answers.

FEEDBACK: Thank the participants for sharing.

SHOW SLIDE: *Evaluate the Cooperative Purchasing Group*

SAY: Once existing cooperative purchasing groups are identified in the area and the SFA's needs have been determined, an evaluation process can determine if there is a group that meets the needs of the SFA. If choosing to join an existing cooperative, an evaluation process must determine if their procedures comply with the Program and government-wide regulations.

Instructor's Note: Remind participants that the *Evaluate and Compare Features of Cooperative Purchasing Groups* handout can be found in the Participant's Workbook.

DO: Refer participants to the "Evaluate and Compare Features of Cooperative Purchasing Groups" handout in the chat box.

SAY: In the chat box, you will find a handout titled, "Evaluate and Compare Features of Cooperative Purchasing Groups." While we are not going to spend our time together to complete this activity, I encourage you to reference it on your own time if you are considering joining a cooperative purchasing group.

Objective: Summarize the advantages and disadvantages of procuring through a cooperative purchasing group.

SHOW SLIDE: *Cooperative Purchasing Group Efforts*

SAY: Purchasing through a cooperative purchasing group may or may not be beneficial to your SFA. The benefits may produce considerable savings, improve the quality of products purchased, and offer greater economy and efficiency for procurement or use of common or shared goods or services. On the other hand, the possibility of fewer deliveries or the elimination of some specific products may not be beneficial and may cause hardship to an SFA. As with any group effort, there are advantages and disadvantages, and each SFA must make the best decision for their program as approved by their administration and governing board.

SHOW SLIDE: *Advantages and Disadvantages*

SAY: Once the advantages and disadvantages of group purchasing have been identified, an informed decision can be made. First, let's explore the advantages of procuring through cooperative purchasing groups.

SHOW SLIDE: *Sodium Reduction Spotlight: Purchasing Power and Volume*

SAY: Cooperative purchasing groups can leverage their purchasing power to:

- Demand more availability and/or the development of lower-sodium products.
- Potentially receive lower prices on more obscure school-appropriate lower-sodium products.
- Request volume purchases of lower-sodium products made to specification directly from a manufacturer.

SHOW SLIDE: *Advantages*

SAY: Some additional advantages of a cooperative purchasing group are discussed below.

- Increased Purchasing Power
- Enhanced Quality and Availability of Products
- Reduced Administrative Burden
- Direct to Manufacturer Purchasing
- Increased Purchasing Volume for SFAs
- Networking Opportunities
- Centralized Decision-Making
- Other Benefits

SHOW SLIDE: *Increased Purchasing Power*

SAY: CPGs negotiate purchasing contracts as one large entity. Combined purchasing volume provides an opportunity for:

- Lower prices
- A wider range of products to select from
- Higher quality products with more favorable pricing

Combined purchasing power increases the ability to purchase large volume items, such as USDA Foods products or products directly from the manufacturer. In addition, CPGs often obtain products from local producers and processors. Purchasing from these alternative procurement sources often provides considerable cost savings.

CPGs can leverage their purchasing power to:

- Demand more availability and/or the development of lower-sodium products
- Potentially receive lower prices on more obscure school-appropriate lower-sodium products
- Request volume purchases of lower-sodium products made to specification directly from a manufacturer

SHOW SLIDE: *Enhanced Quality and Availability of Products*

SAY: With their many responsibilities, SFAs are challenged to stay abreast of all new school products. Members of a cooperative purchasing group offer an enhanced knowledge base of products and often share successful menus. This combined knowledge and sharing influences the quality of meals and increases the availability of a variety of menu items. Providing higher quality meals and offering new and different menu items can contribute to customer satisfaction and increased participation.

SHOW SLIDE: *Reduced Administrative Burden*

SAY: SFAs usually purchase from a variety of vendors and are responsible for developing specifications and conducting procurement activities. In addition, multiple deliveries from multiple vendors interrupt the work day at each site, and proper receiving is labor intensive and thus expensive to the SFA. Collaborative purchasing efforts can result in

- fewer deliveries,
- fewer invoices,
- less paperwork,
- fewer payments processed, and
- less administrative costs.

Belonging to a CPG allows you to avoid time-consuming tasks and administrative burdens of procurement-related functions (for example, researching and developing specifications, preparing solicitation documents, evaluating, awarding, and managing contracts) and focus your attention on other responsibilities. CPGs often utilize a prime distributor, which reduces deliveries, invoices, paperwork, payments processed, labor, and administrative costs for member SFAs. Saves members time researching and developing specifications for lower-sodium products.

The SFA avoids the time-consuming task and decreases the administrative burden of:

- preparing a solicitation document,
- evaluating and awarding contracts,
- decreasing administrative burden and
- managing the contract.

SHOW SLIDE: *Direct to Manufacturer Purchasing*

SAY: Purchasing as a cooperative group may provide the opportunity for volume purchases directly from the manufacturer. It is advantageous and cost-effective to purchase directly from the manufacturer because:

- The cooperative purchasing group will potentially receive the discounts, rebates, and credits directly from the manufacturer, rather than through the distributor.
- The cooperative purchasing group will save the vendor fee for the items it purchases.
- The governing body of the group may consider this option for high-volume items to realize even greater savings.

SHOW SLIDE: *Increased Volume for SFAs*

SAY: Cooperative purchasing may be advantageous for small to medium SFAs or an SFA located in a rural location. Larger SFAs usually have a staff dedicated to conducting and overseeing procurement functions. In small to medium-sized SFAs, a director may serve as the:

- supervisor,
- nutritionist,
- accountant,
- personnel manager, and/or
- food purchaser.

A cooperative purchasing group may help small and rural SFAs attract more vendors willing to deliver to multiple SFAs rather than to a single SFA.

SHOW SLIDE: *Networking Opportunities*

SAY: Belonging to a cooperative purchasing group is an excellent opportunity to share new ideas and network with other SFA directors. Newer group members benefit from the knowledge of more experienced SFA directors. Each member of the group brings different information about products and vendors, which provides the opportunity to share and learn from each other.

SHOW SLIDE: *Centralized Decision-Making*

SAY: One of the benefits of group purchasing is the decision-making of the group's governing board. A designated individual from the group has direct contact with the vendor awarded the contract. For example, if a vendor fails to comply with the contract terms, the problem is addressed by a designated representative of the group with the consent of the governing body.

That designated individual discusses product specifications and potential new products. Each SFA has very little contact with the vendor and can focus attention and time on other responsibilities. As a member of the group, the SFA has access to a skilled leadership team and governing board to help find solutions to procurement problems.

SHOW SLIDE: *Other Benefits*

SAY: Other potential benefits of cooperative group purchasing efforts include an increase in expertise and resources. The sharing of best practices among members can lead to labor savings for individual SFAs. Over time, the group matures and gains trust in each other, and this can lead to many other areas of cooperation.

Some additional resources that may be developed are:

- group marketing plan;
- annual promotion calendar;
- group cycle menus and production records for the various age groups;
- staff training and continuing education programs;
- branding, including labels and paper goods; and
- specialty solicitations for common goods such as milk, bread, and processing of USDA Foods.

SHOW SLIDE: *Disadvantages of Cooperative Purchasing*

SAY: Now, let's discuss some disadvantages of cooperative purchasing:

- Consensus among members
- Deliveries
- Food costs
- Storage
- Administrative costs

SHOW SLIDE: *Consensus Among Members*

SAY: Agreeing on product specifications can be one of the biggest challenges for cooperative purchasing groups. It is critical for members to come to a consensus on products. Some groups allow members to place similar products on the solicitation when members cannot agree on a particular item. Purchases should be consolidated as much as possible to achieve a more economical approach. Failing to consolidate purchases can be problematic for the vendor and create higher prices for the SFAs. To receive the best possible price, the best practice is for members to agree on similar products.

CPGs often have opportunities to procure a broader range of products and higher quality menu items than what can be procured by an individual SFA. Higher quality products may drive increased student participation in school meals, which may offset food costs. However, you need to be willing to compromise with other group members on what products to procure. This compromise means that you *MAY* need to replace current products with higher quality versions (potentially increasing your food costs) OR eliminate certain items from your menu.

SHOW SLIDE: *Deliveries*

SAY: While many cooperative purchasing groups continue to accommodate a once/week delivery option, there is the possibility of larger and less frequent deliveries. The number of deliveries and different location drops can be a major negotiating factor between the group and the vendor. In order to economize, some cooperative purchasing groups choose to have larger quantities of food delivered less frequently. The fewer the deliveries, the more cost-effective the service will be for the group. However, accommodations outside the agreed-upon delivery schedule may impose penalties on an SFA. Check your dry and cold storage spaces to see if you can accommodate an increase in delivery volume.

SHOW SLIDE: *Food Costs*

SAY: While one advantage of a cooperative purchasing group is better prices, there is a possibility that the group requires higher-quality products than those used by an individual SFA prior to becoming a member. Small SFAs could cause costs to increase for larger SFAs.

Agreeing on product specifications can be one of the biggest challenges for group. When the increased quality results in an increased cost that cannot be sustained, the solution is to:

- compromise with a suitable substitute,
- eliminate the product from the menu, or
- purchase the item independently using the applicable procurement method.

SHOW SLIDE: *Storage*

SAY: In some cases, SFA's dry and cold storage space cannot accommodate an increased delivery volume due to less frequent deliveries. When this occurs, SFAs often have to purchase additional storage equipment or rent additional storage space. When the cooperative purchasing group establishes a minimum delivery, each SFA may need to compare the savings gained by the group to the cost of purchasing the new equipment or paying rental fees for needed equipment.

SHOW SLIDE: *Administrative Costs*

SAY: There may be administrative costs in operating a cooperative purchasing group. Usually, membership fees are required for the sustainability of the group. These fees can range from a flat fee based on district enrollment to a per-student fee, or a fee per case of product delivered. Fees are allowed but must be transparent.

Fees must be included when conducting a cost analysis to participate in the group, especially when the procurement is expected to exceed the most restrictive small purchase threshold ([2 CFR 200.323\(a\)](#)). Fees may offset the potential savings of increased purchasing power as compared to the cost incurred by conducting the procurement on their own.

Other costs may be involved in group purchasing. Often the group requires SFAs to deposit an amount equal to the average of one-month's purchases into a specified account for the purpose of ensuring payments are made in a timely manner. All costs to participate in the group purchasing must be considered to ensure the group effort is in the best interest of the Program.

SHOW SLIDE: *Activity: Benefits and Challenges***Activity: Benefits and Challenges****Materials:** Breakout Rooms, Mute/Unmute, Raise Hand, Chat functions**Time:** 15 minutes**Instructions:** Divide participants into groups for Breakout Rooms of 3 participants each. Instruct participants to identify and discuss the benefits and challenges of their SFA belonging to a cooperative purchasing group. Allow 10 minutes in the breakout rooms. End the Breakout Rooms. Instruct participants to use the mute/unmute or chat function to share.

SAY: We have discussed the advantages and disadvantages of procuring through a cooperative purchasing group. In your Breakout Room, identify and discuss the perceived benefits and challenges of your SFA belonging to a cooperative purchasing group. Remember to us take notes for yourself to reference later.

Instructor's Note: Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.

ASK: Who would like to share?

FEEDBACK: Thank the participants for sharing.

SHOW SLIDE: *Lesson 2 Summary*

SAY: To wrap up this lesson, we learned:

- How to form a cooperative purchasing group.
- How to join a cooperative purchasing group.
- Advantages and disadvantages exist in belonging to a cooperative purchasing group.

DO: Encourage participants to take a 5-minute break before Lesson 3.

LESSON-AT-A-GLANCE

LESSON 3: PROCUREMENT STRATEGIES

Objective: Develop a plan to survey neighboring school districts to see what lower-sodium products they recommend.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
10 minutes	<ul style="list-style-type: none"> Local SNA meetings Informal surveys Conversations 	<ul style="list-style-type: none"> Create a plan to survey SFAs on products 	<ul style="list-style-type: none"> Paper or notetaking method of choice Pen/pencil

Objective: Recall strategies for writing product specifications that will facilitate procurement of lower-sodium products.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> List strategies 	<ul style="list-style-type: none"> Writing Nutrition Standards that Limit Sodium 	<ul style="list-style-type: none"> Writing Nutrition Standards That Limit Sodium handout Paper or notetaking method of choice Pen/pencil

Objective: Summarize strategies to collaborate with vendors and procurement partners to identify lower-sodium products that are accepted by students and other customers.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> Discuss strategies 	<ul style="list-style-type: none"> Sharing Success to Discuss Strategies 	<ul style="list-style-type: none"> Paper or notetaking method of choice Pen/pencil

Objective: Develop criteria for comparing the various vendor products, e.g., nutrition standards, taste, and student acceptability.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
15 minutes	<ul style="list-style-type: none"> Comparing products 	<ul style="list-style-type: none"> Compare Vendors 	<ul style="list-style-type: none"> Comparing Vendor Products handout Paper or notetaking method of choice Pen/pencil



LESSON 3: PROCUREMENT STRATEGIES

SHOW SLIDE: *Procurement Strategies*

SAY: Our third lesson will discuss procurement strategies for lower-sodium products. In this lesson, we will discuss how to use your network to find lower-sodium products, list the strategies for writing product specifications, summarize strategies to collaborate with vendors and procurement partners, and create criteria for comparing the various vendor products. Let's get started.

Objective: Develop a plan to survey neighboring school districts to see what lower-sodium products they recommend.

SHOW SLIDE: *Use Your Network*

SAY: Use your network to determine what lower-sodium products they are using and what students enjoy. This is a great strategy for finding lower-sodium products by asking your neighboring school districts what products they recommend. This can be done through informal surveys and conversations, or you can use a more formal plan to gather information on lower-sodium products. Let's discuss the steps to develop a plan to survey other districts.

SHOW SLIDE: *Identify the neighboring school districts*

SAY: Identify the neighboring school districts: First, determine which school districts are considered "neighboring." This can be accomplished by consulting maps of the region, talking to local education authorities or your State agency, or searching online.

SHOW SLIDE: *Create a list of products*

SAY: Create a list of products: Make a list of commonly consumed foods that contain high amounts of sodium, such as pizza, chicken tenders, and macaroni and cheese. Identify the brands and types of these products that are currently used in your school district.

SHOW SLIDE: *Develop a survey*

SAY: Develop a survey: Develop a short survey to gather information from neighboring school districts on lower-sodium products. The survey should include questions about which products are used, how they are prepared, and how they are received by students.

SHOW SLIDE: *Contact neighboring school districts*

SAY: Reach out to neighboring school districts via email or phone to explain the purpose of the survey and request their participation. Provide a deadline for completing the survey and a contact person for any follow-up questions.

SHOW SLIDE: *Collect and analyze the data*

SAY: Collect and analyze the data: Collect the data from the survey responses and compile it in a spreadsheet or database. Analyze the data to determine which lower-sodium products are commonly used in neighboring school districts, and whether they are successful in terms of taste and student acceptance.

SHOW SLIDE: *Consider changes*

SAY: Consider changes: Based on the findings, consider making changes to the products currently used in your school district to incorporate lower-sodium options that are popular in neighboring districts.

SHOW SLIDE: *Activity: Sharing Success*

Activity: Sharing Success

Materials: Breakout Rooms, Mute/Unmute, Raise Hand, Chat functions

Time: 15 minutes

Instructions: Divide participants into groups for Breakout Rooms of 3 participants each. Instruct participants to share success in using their network to find lower-sodium products. Allow 10 minutes in the breakout rooms. End the Breakout Rooms. Instruct participants to use the mute/unmute or chat function to share

SAY: We have discussed how to create a plan for surveying your neighboring districts to find lower-sodium products. In your Breakout Room, share your successes in using your network to find lower-sodium products

Instructor's Note: Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.

ASK: Who would like to share?

DO: Allow participants time to share their answers. Thank the participants for sharing.

Objective: Recall strategies for writing product specifications that will facilitate procurement of lower-sodium products.

SHOW SLIDE: *Writing Specifications That Limit Sodium*

SAY: Prior to planning menus for your school nutrition program, it is important to write specifications that clearly identify the products and the nutrition standards for sodium that you want to purchase from distributors and/or manufacturers. Understanding the different methods to write a nutrition standard for sodium within a product specification—and when to use them—allows you to procure products that achieve menus below the weekly sodium targets.

SHOW SLIDE: *Product Specifications for Use in a Competitive Procurement Process*

SAY: A specification is a description of the characteristics you are seeking in a food product.

- Product name
- Product description
 - Type
 - Cut, shape
 - Portion size
 - Precooked weight
 - Frozen, fresh, or dry
- Brand name
 - Manufacturer's name, description, code number, pack size
 - "Pre-approved equal" wording
- Case pack and weight
- Main ingredients
- Other product ingredients
- Prohibited ingredients
 - For example, food additives, artificial colors and flavors, food allergens
- Minimum and maximum sizes and pieces
- Unit on which award is made
- Quality indicators
 - Standards of Identity (SOIs)
 - USDA Grades and Standards
- Meal pattern equivalents
 - Child Nutrition (CN) label
 - Product Formulation Statement (PFS)
- Nutrition standards
 - For example, limits on calories, sodium, saturated fat; milk vitamin fortification and fat content; zero grams added trans fats
- Buy American

SHOW SLIDE: *Nutrition Standard*

SAY: The product type determines the characteristics to include in a specification, including if it requires or should include a nutrition standard. Examples of product types include:

- Fresh produce
- Milk
- Fresh meat, poultry, and fish
- Commercially processed, packaged, and prepared foods

Nutrition standards are required for certain products, such as:

- Milk [must be fortified with vitamins A and D, fat-free (skim), or low-fat (1%)] and
- Commercially processed, packaged, and prepared foods (must contain zero grams of trans fats per serving).

Including nutrition standards in the product specifications of foods can help you meet the National School Lunch Program (NSLP) and School Breakfast Program (SBP) dietary requirements, which limit calories, sodium, and the percentage of calories from saturated fat and prohibit added *trans* fats.

The product type also determines which nutrition standards to address in your product specifications. Consider including a nutrition standard to limit sodium in specifications for commercially processed, packaged, and prepared foods such as:

- Bread products
- Canned vegetables and legumes
- Condiments
- Heat-and-serve entrées
- Potato products
- Processed meats
- Tomato-based products
- Seasoned/flavored vegetables

SHOW SLIDE: *Writing Specifications that Limit Sodium*

SAY: There are three different approaches to writing sodium nutrition standards within your product specifications:

- Sodium Nutrient Claims
- Smart Snack Compliant
- Maximum Sodium Limit

Let's take a closer look at each of these.

SHOW SLIDE: *Sodium Nutrient Claims*

SAY: Lower-sodium versions of products—primarily canned/bottled goods and some frozen goods—are often labeled with U.S. Food and Drug Administration (FDA) sodium nutrient claims such as “Low Sodium,” “Reduced Sodium,” or “No Salt Added.” These products may offer lower-sodium versions of the food products you currently use. You can use these claims as your nutrition standard for sodium within a specification.

It's important to note that one brand's “Low Sodium” product may be higher or lower in sodium than another brand's product labeled “Low Sodium.” As long as both brands' products are equal to or less than 140 mg sodium per serving, they can both use the nutrient claim “Low Sodium.” Keep in mind these possible sodium amount differences when comparing similar sodium nutrient claims between brands. For example, depending on the popularity of the product and the frequency in which it is used, offering a low-sodium product with 100 mg sodium per serving versus 140 mg sodium per serving can make a difference in your menu's weekly sodium total. Use the Nutrition Facts label to compare the milligrams of sodium per serving (and the serving size) across commercial brands to identify which products are lower in sodium.

ICN's [Sodium Swaps: Utilizing Product Substitution](#) worksheet provides more information on FDA sodium nutrient claims.

Instructor's Note: Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Sodium Swaps: Utilizing Product Substitution](#) handout

SHOW SLIDE: *Smart Snacks Compliant*

SAY: Similar to using a sodium nutrient claim, indicating “Smart Snacks compliant” in the specification is another method to limit sodium—it will also limit the total calories, saturated fat, *trans* fats, and added sugars in a product. “Smart Snacks” entrées and side items are limited to ≤ 480 mg and ≤ 200 mg of sodium per item, respectively. Please refer to USDA’s [A Guide to Smart Snacks in Schools](#) for more detailed information on Smart Snacks.

Instructor’s Note: Instructor’s Note: Remind participants that the links can be found in the Participant’s Workbook on the additional resources page.

Links for reference: USDA’s [A Guide to Smart Snacks in Schools](#) handout

SHOW SLIDE: *Maximum Sodium Limit*

SAY: When products do not qualify for or are not labeled with a sodium nutrient claim, OR when you want to procure a product that falls at or below a specific sodium amount, it’s best to include a maximum sodium limit as the nutrition standard within the specification. Determining the sodium limit requires product and menu analysis. The U.S. Food and Drug Administration’s (FDA) [Guidance for Industry: Voluntary Sodium Reduction Goals](#) may prove helpful in determining maximum sodium limits for certain products. Once you know your limit, you can insert it within the specification with variations of the following terms:

- “No more than,”
- “May not exceed,” or
- “A maximum limit of” XYZ mg of sodium per serving

Refer to ICN’s [Working With Your Procurement Partners](#) worksheet for more information about procuring lower-sodium products.

Instructor’s Note: Instructor’s Note: Remind participants that the links can be found in the Participant’s Workbook on the additional resources page.

Links for reference: [Guidance for Industry: Voluntary Sodium Reduction Goals](#) and [Working With Your Procurement Partners](#)

SHOW SLIDE: *Examples of Product Specifications That Limit Sodium*

SAY: Writing specifications is an important aspect of the procurement process. Next, we will go through examples of partially written product specifications for use in formal or informal procurement documents. They demonstrate how to limit sodium using the three different approaches previously described.

SHOW SLIDE: *Use Sodium Nutrient Claims*

SAY: Examples of specifications using sodium nutrient claims:

- GREEN BEANS, Cut, Canned, Grade B or better, Low sodium.
 - CARROTS, Diced, Frozen, Grade A, No salt added.
-

SHOW SLIDE: *Require Products to Meet Smart Snack Requirements*

SAY: Examples of specifications that are required to meet Smart Snack requirements:

- BAGEL, BLUEBERRY, Sliced. First and primary ingredient must be whole grain. The product must contain at least 50% whole grain content. Smart Snacks compliant (2.00 oz. equivalent Grains). Product Formulation Statement preferred.
- GRANOLA, CINNAMON, Individually wrapped. First and primary ingredient must be whole grain. The product must contain at least 50% whole grain content. Smart Snacks compliant (1.00 oz. equivalent Grains). Product Formulation Statement preferred.

SHOW SLIDE: *Define Maximum Sodium Limits*

SAY: Examples of specifications that define the maximum sodium limits:

- BURRITO, BEAN & CHEESE, Fully cooked, IQF. Pinto and black bean burrito on a whole grain-rich tortilla. Cannot contain beef, poultry, pork, or fish by-products or MSG. Must contain between 300-350 calories, less than 10% calories from saturated fat, zero trans fat, and may not exceed 500 mg of sodium per individual portion (1.00 oz. equivalent M/MA, 1.50 oz. equivalent Grains). CN label or Product Formulation Statement required.
- CHICKEN NUGGETS, Breaded, Fully cooked, IQF. Maximum limit of 400 mg of sodium per 5 piece portion (2.00 oz. equivalent M/MA, 1.00 oz. equivalent Grains). CN label or Product Formulation Statement required.
- PIZZA, CHEESE, Sliced, Frozen. Whole grain crust, 100% real cheese (no imitation). No more than 500 mg of sodium per portion slice (2.00 oz. equivalent M/MA, 2.00 oz. equivalent Grains, 1/8 cup R/O Veg). CN label or Product Formulation Statement required.
- POTATOES, FRENCH FRIES, Seasoned, Frozen, Ovenable, 1/2" Crinkle cut, Low moisture, U.S. Grade A. Processed in vegetable oil. No more than 200 mg of sodium per 1/2 cup serving.
- TOMATO, SAUCE, Marinara, Dipping cups. No HFCS. May not exceed 200 mg of sodium/2.5 oz individual portion cup. Minimum 9 months shelf life from production.
- TORTILLA, FLOUR, 8", Whole grain-rich. Maximum limit of 225 mg of sodium per portion (1.50 oz. equivalent Grains). Product Formulation Statement preferred.

SHOW SLIDE: Activity: Writing Nutrition Standards That Limit Sodium**Activity: Writing Nutrition Standards That Limit Sodium**

Materials: *Writing Nutrition Standards That Limit Sodium* handout, pen/pencil

Time: 10 minutes

Instructions: Instruct participants to use the handout *Writing Nutrition Standards That Limit Sodium* to practice the weighted analysis example. They will work independently for 5 minutes, and then share their answers with the group.

SAY: Now it's your turn to consider sodium nutrition standards for the higher-sodium products used in your menu. Using the handout *Writing Nutrition Standards That Limit Sodium*, list one product from your menu that fits within each category and review the specifications used in your competitive procurement process. Then, write a new sodium nutrition standard you could incorporate into the specification the next time you are ready to competitively procure the product.

Instructor's Note: Remind participants that the *Writing Nutrition Standards That Limit Sodium* handout can be found in the Participant's Workbook.

DO: Allow participants 5 minutes to work independently. Encourage participants to respond. Allow participants time to unmute and answer or post in the chat. After participants have responded, click to display the feedback on the slide and summarize.

FEEDBACK: Thank the participants for sharing.

SAY: Including nutrition standards that limit sodium in your written specifications is a strategy that will help you procure lower-sodium products.

Objective: Summarize strategies to collaborate with vendors and procurement partners to identify lower-sodium products that are accepted by students and other customers.

SHOW SLIDE: Vendors and Procurement Partners

SAY: It is important to talk to vendors and procurement partners after setting nutrition standards for products because they are the ones who will be responsible for sourcing and providing the products that meet these standards. By communicating with them, you can ensure that they understand the standards and can work to provide the products that meet them. This communication can also help to establish a partnership and a shared commitment to improving the nutritional quality of the products that are being offered.

SHOW SLIDE: *Potential Questions to Ask*

SAY: Let's review some potential questions to ask to help you obtain lower-sodium products.

Current/New Vendors:

- Do you provide a low-sodium version of [product] or a similar product that is lower in sodium?
- What is the product's cost and availability?
- Is it a special order?
- Do you have any product recommendations?
- If a broker or vendor approaches you with new lower-sodium products, be sure to ask for product catalogs, brochures, nutrition information, crediting information, and taste-tasting samples to use.
- We identified via [another school district, trade show, catalog, etc.] that you carry [low sodium product]. Would you be interested in working with our school district?

Manufacturers:

- We are interested in having you make [low-sodium product] for our school district. Would you be willing to discuss the specification, amount, pricing, timing, and delivery?
Solicitations must be open and competitive if above the micro-purchase threshold level.

In addition, consider:

- Replacing heat-and-serve food products with a recipe to prepare in the kitchen. Research standardized recipes for the desired food product to add as a menu item. Check out the [Child Nutrition Recipe Box](#) (CNRB) to get started!
- Working with your State agency to determine if there are USDA Foods direct-delivered products that could be a lower-sodium alternative to a product you are currently sourcing commercially.

Instructor's Note: Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Child Nutrition Recipe Box](#)

SHOW SLIDE: *Activity: Sharing Success***Activity: Sharing Success****Materials:** Mute or Unmute, Raise Hand, Chat Functions**Time:** 5 minutes**Instructions:** Instruct participants to use the mute/unmute or chat function to share success in communicating with vendors and procurement partners to find lower-sodium products.**ASK:** Who would like to share an example of communicating with vendors and procurement partners to find lower-sodium products?**DO:** Allow participants time to share their answers.**FEEDBACK:** Thank the participants for sharing.

Objective: Develop criteria for comparing the various vendor products, e.g., nutrition standards, taste, and student acceptability.**SHOW SLIDE: *Comparing Products*****SAY:** When comparing vendor products for school nutrition programs, it's important to consider criteria such as nutrition standards, taste and student acceptance, variety and diversity, and cost. Let's discuss these further.

SHOW SLIDE: *Nutrition Standards***SAY:** It's crucial that the vendor products meet the minimum nutritional requirements set by the regulations. The products should contain essential nutrients such as protein, fiber, vitamins, and minerals, while limiting saturated fats, sodium, and added sugars. The nutritional quality of the products should be a top priority to ensure that students are getting the nutrients they need to support their growth and development.

Incorporating nutrition standards into the evaluation of vendor products ensures that school meals are not only delicious but also meet the requirements and contribute to the health and well-being of students.

SHOW SLIDE: *Taste and Student Acceptance*

SAY: The vendors products should be appealing and palatable to the students. Taste is a significant factor that can impact student acceptance and satisfaction with school meals. Students are more likely to eat and enjoy meals that taste good, so it's important to select products that have a pleasant taste and flavor. Conducting taste tests with students can be an effective way to evaluate the taste and gather feedback. Refer to the tipsheet in the chat box for more details on conducting taste-tests with your students.

Incorporating student acceptability into the comparison of vendor products ensures that school meals are not only nutritious but also enjoyable for students. By actively seeking and valuing student feedback on taste and preferences, educational institutions can create menus that promote healthy eating habits while satisfying the diverse tastes of their student population.

Instructor's Note: Instructor's Note: Remind participants that the links can be found in the Participant's Workbook on the additional resources page.

Links for reference: [Planning, Implementing, and Assessing Taste-Test Surveys](#)

SHOW SLIDE: *Variety and Diversity*

SAY: The vendor's should offer a variety of products to meet the different dietary needs and preferences of students, including vegetarian and culturally diverse options. This ensures that all students have access to meals that meet their individual needs, tastes, and preferences. The vendor should provide options that are inclusive of all students, regardless of their cultural background or dietary restrictions.

Incorporating variety and diversity into the comparison of vendor products fosters inclusivity and ensures that school meals cater to the individual needs and preferences of all students. A well-thought-out menu that embraces cultural diversity, dietary restrictions, and nutritional balance creates an environment where students can enjoy a variety of delicious and nutritious options, ultimately promoting their well-being and satisfaction with school meals.

SHOW SLIDE: *Cost*

SAY: The vendor's products should be reasonably priced and within the budget of the school nutrition program. It's important to consider the total cost of the product, including shipping, handling, and storage. Schools must balance the cost of the products with their nutritional quality and other factors such as taste and variety. Choosing affordable products can help schools provide nutritious meals while staying within their budget.

Incorporating cost considerations into the comparison of vendor products allows school nutrition programs to provide nutritious meals without overspending. By carefully evaluating the total cost of products and seeking cost-effective options, schools can maximize their budget while ensuring that meals meet nutritional standards and other important factors like taste and variety.

SHOW SLIDE: *Activity: Comparing Vendor Products*

Activity: Comparing Vendor Products

Materials: *Comparing Vendor Products* handout, pen/pencil

Time: 5 minutes

Instructions: Instruct participants to use the handout *Comparing Vendor Products* to review the criteria for comparing the various vendor products. They will work independently for 3 minutes, and then share their answers with the group.

SAY: Let's look at the *Comparing Vendor Products* handout. While we are not going to spend our time together to complete this activity, I encourage you to reference it on your own time if you are comparing two (or more) vendor products. For now, review the chart and think of ways you can use it in the future.

Instructor's Note: Remind participants that the *Comparing Vendor Products* handout can be found in the Participant's Workbook.

DO: Allow participants 2 minutes to work independently. Encourage participants to respond. Allow participants time to unmute and answer or post in the chat.

FEEDBACK: Thank the participants for sharing.

SHOW SLIDE: *Lesson 3 Summary*

SAY: To wrap up this lesson, we learned:

- Networking is a great way to identify lower-sodium products used by other SFAs.
- Strategies to collaborate with vendors and procurement partners to identify lower-sodium products that are accepted by students and other customers.
- Criteria for comparing the various vendor products.

DO: Encourage participants to take a 5-minute break before the Culminating Activity and Action Plan.

LESSON-AT-A-GLANCE CULMINATING ACTIVITY AND ACTION PLAN

Objective: Develop an action plan to procure lower-sodium foods to reduce the overall sodium content of the menus.

TIME ALLOWED	TOPIC	ACTIVITY	MATERIALS
35 minutes	<ul style="list-style-type: none">Put it all together	<ul style="list-style-type: none">Culminating ActivityAction Plan	<ul style="list-style-type: none">Action Plan handoutPen/pencil
5 minutes	<ul style="list-style-type: none">Wrap Up	<ul style="list-style-type: none">Post-Assessment	<ul style="list-style-type: none">Post-Assessment

CULMINATING ACTIVITY AND ACTION PLAN

SHOW SLIDE: *Culminating Activity and Action Plan*

SAY: Our final lesson today is unique. You will be using all of the procurement knowledge and strategies that you learned to review your own menus. You will have 20 minutes to work independently to complete the culminating activity and your action plan. For the activity, you will need a copy of your current menu. If you currently use a cycle menu, we encourage you to look at it in its entirety to identify ways to incorporate the many procurement strategies to find lower-sodium products. Remember, small, gradual changes are recommended; however, you can use this time and your action plan to map out your overall plan.

Objective: Develop an action plan to procure lower-sodium foods to reduce the overall sodium content of the menus.

SHOW SLIDE: *Activity: Independent Work Time*

Activity: Culminating Activity and Action Plan

Materials: *Action Plan* handout, pen/pencil, menu, access to nutrient analysis, product specifications/nutrition information for current menu items

Time: 20 minutes

Instructions: Instruct participants to analyze and assess their school menu to identify opportunities to procure lower sodium foods to reduce the overall sodium content of the menus. Choose one or two strategies to focus on and plan how they will incorporate them into their program. Participants will write SMART goals targeted at procurement activities that can be completed post-training to reduce sodium in menus. They will work independently for 20 minutes, and then share their answers with the group.

SAY: It's your turn to practice. Gather your menu, nutrient analysis, product specifications/nutrition information for current menu items, and any other resources you need to review your menus and current food products. You will analyze and assess your school menu to identify opportunities to procure lower-sodium foods to reduce the overall sodium content of the menus. Then, you will write SMART goals targeted at procurement activities that can be completed post-training to reduce sodium in menus. A SMART goal is a specific, measurable, achievable, relevant, and time-bound objective designed to guide and evaluate progress effectively. You will work independently for 20 minutes, and then share your strategies and action plans with the group. We will reconvene in twenty minutes.

Instructor's Note: Remind participants that the *Action Plan* worksheet and *SMART Goals* handouts can be found in the Participant's Workbook.

DO: Start the timer on the slide and display on the screen. Allow the participants to work independently for 20 minutes. After the time is up, welcome the participants back to the group.

Instructor's Note: Feel free to turn off your camera and mute during the 20 minutes of independent work. Be ready to start back on time.

SHOW SLIDE: Activity: Sharing Strategies and Action Plans**Activity: Sharing Strategies and Action Plans**

Materials: Sodium-Reduction Strategies for their menus, Action Plans

Time: 15 minutes

Instructions: Break participants into breakout rooms of 3-4 people. Instruct participants to share their identified opportunities to procure lower sodium foods to reduce the overall sodium content of the menus and their action plans to incorporate the strategies. Allow participants to share in the breakout rooms for 10 minutes. Then, bring the group together to share highlights and main points.

SAY: Welcome back! I cannot wait to hear about all the great sodium-reduction strategies you have planned. I will be sending you into breakout rooms to share and discuss the identified opportunities to procure lower-sodium foods to reduce the overall sodium content of the menus. Then, we will come back as a group to share highlights and main points.

Instructor's Note: Divide participants into groups for Breakout Rooms of 3 participants each. Allow 10 minutes in the breakout rooms. End the Breakout Rooms.

SAY: Who would like to share first?

DO: Encourage participants to respond. Allow participants time to unmute and answer or post in the chat.

FEEDBACK: Thank the participants for sharing.

SAY: Wow, you all have identified some great strategies to reduce sodium in your menus. Best of luck in your sodium-reduction journey.

WRAP UP



SHOW SLIDE: *Thank You!*

DO: Ask participants to complete the Post-Assessment. Ask participants to complete the evaluation. Thank participants. Ask if there are any questions. Answer participants' questions. Distribute the training certificates out at this time.

Instructor's Note: Paste the link to the post-assessment into the chat.

APPENDIX



The Shaking It Up! sodium resources provide tangible, practical guidance for school nutrition professionals to implement sodium reduction best practices and strategies in their school foodservice operations. The worksheets provide a deep dive into a sodium-reduction topic and related strategies, feature scenarios or school success stories to demonstrate sodium-reduction best practices, and include activities to test and reinforce key concepts.

Featured worksheets:

- Utilizing USDA Foods and USDA DoD Fresh Programs
- Incorporating Local Foods in School Nutrition Programs
- Cooperative Purchasing Groups
- Working With Your Procurement Partners
- Writing Specifications That Limit Sodium



UTILIZING USDA FOODS AND USDA DoD FRESH PROGRAMS

The U.S. Department of Agriculture, Food and Nutrition Service (USDA, FNS) offers **USDA Foods in Schools** ([USDA Foods](#)), which includes the **USDA Department of Defense Fresh Fruit and Vegetable Program** ([USDA DoD Fresh](#)), to financially support School Food Authorities (SFAs) through purchases of 100% American grown and produced foods for use in school nutrition programs. These programs can also help you meet the School Breakfast Program (SBP) and National School Lunch Program (NSLP) meal patterns and dietary specifications, including sodium nutrition standards.



USDA Foods
in Schools

USDA FOODS

USDA purchases U.S. grown, processed, and packaged foods for nutrition assistance programs, including school meals. More than 200 USDA Foods products, including fruits, vegetables, grains, and meats/meat alternates that meet strict nutrition quality and food safety requirements, are available to order. USDA Foods are available through three ordering options:

- Direct delivered USDA Foods
- Bulk USDA Foods that can be sent to processors
- USDA DoD Fresh

USDA DoD FRESH

A partnership between USDA and DoD provides domestically grown, whole, and pre-cut fresh fruits and vegetables for use in school meals as USDA Foods. The DoD Defense Logistics Agency (DLA) leverages its buying power by contracting with produce vendors for weekly deliveries of a wide variety of produce to schools and other locations.

Utilize your USDA Foods entitlement dollars for USDA Foods products and USDA DoD Fresh produce to provide wholesome meals at a lower cost.

USING USDA FOODS TO LOWER SODIUM IN SCHOOL MEALS

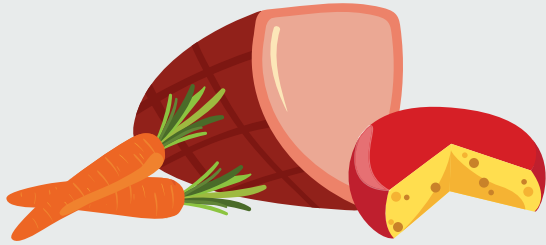
You can substitute many commercial food products with USDA Foods to help lower the overall sodium content of your weekly menu. All USDA Foods processed vegetable and bean products are *low sodium* or *no salt added*, often making them lower in sodium than their commercial equivalents. USDA Foods has also reduced the sodium content in many of its cheese, meat, poultry, and fish products in recent years.

You can find USDA Foods products available for the upcoming school year on the [USDA Foods Available List](#) posted under the subheading "USDA Foods in Schools (USDA-FIS)." The list is categorized by food group and indicates vegetable subgroups and whole grain or whole grain-rich products. *Low sodium* and *no salt added* products are clearly labeled.

[USDA Foods Product Information Sheets](#) provide a product description, crediting/yield information, nutrition information, culinary tips and recipes, food safety, and allergen information for all USDA Foods. Products are categorized by food type (fruit, vegetables, grains, meats/meat alternates, and other foods) and listed alphabetically. You can use the included Nutrition Facts label to compare sodium amounts between commercial and USDA Foods products.

FINDING THE LOWEST-SODIUM PRODUCT

1 Review the [USDA Foods Available List](#), particularly products listed under *Vegetables, Beef Products, Pork Products, Poultry Products, Legumes, and Cheese*. What are three (or more) USDA Foods products you are interested in incorporating into your school nutrition program?



2 After reviewing the [USDA Foods Available List](#), use the following table to list five commercial food products you offer directly in your menu or incorporate into a recipe that you could substitute with a USDA Foods product. Compare the crediting, yield, and nutrition attributes of the commercial products (using their product specification sheets and Nutrition Facts labels) and USDA Foods products (using the [USDA Foods Product Information Sheets](#)). For each product, document and compare the sodium amount per serving.

Commercial Product Description	Sodium (mg)/Serving	USDA Foods Description	WBSCM ID	Sodium (mg)/Serving
Potatoes, Frozen, Wedge Fries, Skin On	120 mg per ½ cup	Potatoes, Wedges, Low Sodium, Frozen	100355	45 mg per ½ cup

USING USDA DoD FRESH TO LOWER SODIUM IN SCHOOL MEALS

Fresh produce naturally has very little or no sodium at all. Incorporating more fresh produce in the school menu—either raw, frozen, cooked and seasoned with herbs and spices, or prepared in a recipe—can help reduce the amount of sodium consumed in the meal.

The following list provides a snapshot of the different types of U.S. grown fresh produce you can order when your SFA participates in USDA DoD Fresh. Many varieties, package sizes, and forms of produce (mixes, snack packs, etc.) are available. Keep in mind that fresh produce availability varies by season, region of the country, and vendor. You can even request that your vendor add specific produce items to the catalog, but they must be grown in the U.S. and be fair and reasonably priced.

SNAPSHOT OF USDA DoD FRESH PRODUCE

Apples (Green, Red, Yellow)

Avocados

Beans, Green

Blackberries

Blueberries

Broccoli

Cabbage (Green, Red)

Carrots (Baby, Whole)

Cauliflower

Collards

Cucumbers

Grapefruit

Grapes (Black, Green, Red)

Honeydew

Kale

Kiwifruit

Lettuce (Iceberg, Leaf, Romaine)

Mushrooms

Nectarines

Onions (Red, White, Yellow)

Onions, Green

Oranges (Clementines, Mandarins)

Peaches

Pears

Peas, Snap

Peppers, Bell

Plums

Potatoes (Red, Russet, White)

Spinach

Squash, Summer (Yellow, Zucchini)

Squash, Winter (Acorn, Butternut, Spaghetti)

Strawberries

Sweet Potatoes

Tangerines

Tomatoes (Cherry, Grape, Round Red)

Watermelon

Other:

Assorted chopped vegetables for soup

Mixed berry cups (various)

Mixed pre-cut vegetables (various)

Salad mixes (various)

Vegetable snack packs (various)



FOOD FOR THOUGHT ACTIVITY

1 Record the different types of fruits and vegetables you currently menu in the table below. Compare your list to the *Snapshot of USDA DoD Fresh Produce* on the previous page. Consider spending your USDA Foods entitlement for produce through USDA DoD Fresh! To get the best value, order in-season produce grown in the U.S. For example, California grown grapes are available June through December. Check out the [SNAP-Ed Seasonal Produce Guide](#) to help you explore different fruits and vegetables throughout the year.

Produce Currently on Your Menu	Available Through USDA DoD Fresh?	
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No
	Yes	No



2

Offering a variety of produce in your menu encourages your students to eat it, which can ultimately help reduce the amount of sodium consumed in a meal.

Which fruits and vegetables from the *Snapshot of USDA DoD Fresh Produce* list would you like to add to your menu?

Produce Wish List



HOW TO PARTICIPATE IN USDA FOODS INCLUDING USDA DoD FRESH

To get started, contact your State Distributing Agency (SDA), which administers USDA Foods including USDA DoD Fresh at the State level. Go to the [USDA, FNS Contacts](#) page and select your respective state and the program *USDA Foods in Schools* in the drop-down boxes. Select the “Contact Info” button for a contact name, number, and email address, and write the contact details in the space provided for reference.

Each year, your SDA determines the value you are entitled to spend on USDA Foods direct delivery or further processing or allocation to USDA DoD Fresh. Your planned assistance level (PAL) is based on your SFA's prior year reimbursable NSLP meals served, multiplied by the annual Federal assistance per meal rate. SDAs work with SFAs to:

- Manage and fully utilize your USDA Foods entitlement dollars
- Allocate a portion of your USDA Foods entitlement dollars to USDA DoD Fresh
- Decide which USDA Foods products will be offered in your state for the upcoming school year.

Each SDA manages these programs differently. **Refer to your SDA for state-specific details and deadlines.**

Incorporating USDA Foods products and USDA DoD Fresh produce in your menu will help you stay within your budget and meet the sodium limits. Visit [USDA Foods in Schools](#) and [USDA DoD Fresh Fruit and Vegetable Program](#) for more information, and contact your SDA today!

My SDA Contact

Name:

Phone:

Email:

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10/04/2024



INCORPORATING LOCAL FOODS IN SCHOOL NUTRITION PROGRAMS

You are in a unique position as a school nutrition operator to connect your school district with local foods that are minimally processed. Implementing strategies to incorporate local foods into your menu and recognizing how to leverage programs from the U.S. Department of Agriculture, Food and Nutrition Service (USDA, FNS) can help you grow your local foods menu. Using more fresh fruits, vegetables, and meats from local farmers and producers can also support your efforts to reduce the sodium content of school meals.

SEASONAL CYCLE MENUS

Incorporating seasonal produce into your cycle menu allows for serving high quality, fresh produce at its nutritional and flavor peak, which decreases the need for additional seasoning. Additional benefits of seasonal cycle menus include:

- A fresh appearance and added color to your menus.
- More variety, which allows you to be more creative and versatile with the menu items you offer.
- Cost savings, as fresh seasonal produce typically costs less than out-of-season produce.

FINDING LOCAL FOODS FOR SCHOOL MENUS

Purchasing local, seasonal produce supports your local economy and helps the environment by reducing packaging, shipping, and storage. Procurement options for local foods vary based on your school district's proximity to where the food is grown or raised, the growing season, and the availability of food processors and distributors. There are different strategies you can use to incorporate local foods into your school breakfast and lunch menus.

First, you need to complete two key steps:

- 1 Define what "local" means to your school or school district.** "Local" may be defined as a certain mile radius from your school or school district. It may also be defined as your county (or include surrounding counties) or your state (or include surrounding states). Consider that the definition may differ depending on the food product or may change throughout the year due to seasonal availability.
- 2 Find out what local products are available to you and when they are in season.** Consider using the following resources:
 - [Land-Grant University – Extension](#)
 - In each state, a network of local agricultural agents and educators, including experts on local food systems, provide publications, programs, and services to the public through their land-grant university – extension service. Find your land-grant university – extension service using the link above.
 - **State or Region-Specific Seasonality Charts**
 - Seasonal produce specific to your area will vary by weather and growing conditions, so be sure to check out your state or region-specific seasonality chart. Many state departments of agriculture or non-profit organizations produce visual representations of what foods are available locally and seasonally in a state or specific region. Search "[Your State's Name] seasonal produce" on the internet and see what you find! In the meantime, SNAP-Ed's [Seasonal Produce Guide](#) can help get you started.
 - [USDA Census of Agriculture](#)
 - USDA's National Agricultural Statistics Service (NASS) surveys all U.S. farmers every five years. Detailed information about agricultural production in each state and county is available online.
 - [USDA Farm to School Census](#)
 - The Farm to School Census reports which school districts purchase local foods and what they purchase. Did your school district participate in the 2019 Farm to School Census?

STRATEGIES TO GROW YOUR LOCAL FOODS MENU

Once "local" is defined and you identify local products that are available to you, it is time to grow your local foods menu! Cultivating your menu and recipes with locally-procured fresh fruits, vegetables, and meats can help replace higher-sodium menu items and recipes. Consider the following strategies to incorporate local foods into your school menu:

- 1 Identify local foods that are already on the menu**
 - Let your distributor know your definition of "local"; ask which foods are procured locally.

Milk is often procured from local dairies.
- 2 Look for local foods to replace what you already offer on the menu**
 - Aim to procure agricultural commodities that are grown in your state or region.
 - Consider using foods grown or harvested by your school district, such as from an edible school garden.
 - Be sure to check with your state and local health departments on whether school-grown foods can be incorporated for consumption on a school menu.

If you are a Michigan school district, are your apples from a local orchard?
- 3 Adjust menus and recipes to incorporate local foods**
 - Fresh fruits and vegetables are a logical starting point. They are naturally lower in sodium and can be served with little to no preparation beyond washing (and cutting).
 - A salad bar is a friendly way to offer various local fruits and vegetables.
 - Expand your local foods beyond fruits and vegetables! Consider ways to incorporate locally produced meat, poultry, eggs, cheese, grains, beans, or seafood while being mindful of the sodium content. Ensure your local foods contain relatively the same or lower amounts of sodium.

Check out the [Salad Bars to Schools](#) initiative to get a salad bar in your school.
- 4 Develop new menus and recipes to highlight local foods and ingredients**
 - Consider promoting one local food product or ingredient every month through a "Harvest of the Month" program.

Check out [Montana's "Harvest of the Month" program](#) for inspiration!

GROW YOUR LOCAL FOODS MENU ACTION PLAN

As you consider incorporating local foods into your school menu, it can be helpful to set a goal and develop an action plan. Use the template below as a guide for your own local foods goal and plan for the next school year. Please note the provided example includes only some of the milestones you would need to reach to achieve the stated goal.

Goal (measurable and specific): By the _____ school year, substitute three (3) menu items or ingredients within recipes with lower-sodium locally-sourced products.

Milestone What will you do to achieve the expected outcome?	Person Responsible	Target Date	Date Completed
1. Determine what "local" means to your school district.			
2. Find out what local products are available to you and when they are in season.			
3. Identify three menu items and/or ingredients within recipes that can be substituted with lower-sodium local products.			
4. Adjust three menu items and/or recipes to incorporate lower-sodium local products.			

LEVERAGING USDA PROGRAMS TO PROCURE LOCAL FOODS

Take advantage of programs such as **USDA Foods in Schools (USDA Foods)** and the **USDA Department of Defense Fresh Fruit and Vegetable Program (USDA DoD Fresh)** to procure local foods. In addition, consider applying for a **USDA Farm to School Grant**, which provides a fantastic opportunity to initiate and expand farm to school efforts!

USDA Foods

Review the annual, retrospective [USDA Foods State-of-Origin Report](#), which lists the products USDA purchased from each state the previous year. Identify the top products purchased from your state and adjacent states to help you plan your food orders.

Ask your State agency to designate “in-state processors” to be used for processing USDA Foods. Although the ingredients may not be local, the end product is. Also consider using your entitlement dollars to procure foods that cannot be purchased locally, leaving more cash reimbursement dollars available to buy local foods. View ICN’s [Utilizing USDA Foods and USDA DoD Fresh Programs](#) worksheet to learn more about lower-sodium USDA Foods and how to participate in the program.

USDA DoD Fresh

When participating in the USDA DoD Fresh Program, you can look for products designated as “local” in your [FEAVORS catalog](#). Most USDA DoD Fresh vendors define “local” as produce sourced from within the state or in adjacent states.

CASE QUANTITY	ITEM CODE	DESCRIPTION	CASE CONTENTS	CASE PRICE	FUND SOURCE
	14P01	Apple Any Type USF/XF 100-113 1/40 LB BS	40 LB	\$35.35	_ State _Snack _Fed
	18B41	Cauliflower Multi-Color 6-8 CT 8 LB CS	*LOCAL 8 LB	\$19.38	_ State _Snack _Fed

Contact your USDA DoD Fresh vendor to determine which local products they expect to carry throughout the year. You can also request that your vendor consider purchasing specific types of products that are produced locally.

Farm to School Grant Program

USDA, FNS [Office of Community Food Systems](#) awards annual, competitive grants (up to \$100,000) that support farm to school activities. They are designed to assist eligible entities in implementing farm to school programs that improve access to local foods in schools.

Currently, schools and school districts that participate in the National School Lunch Program (NSLP) are eligible to apply to one of two available tracks (Turnkey, Implementation) to initiate or expand farm to school efforts. The Turnkey grant would require you to select and complete a specific project and associated activities outlined by FNS. An Implementation grant provides an opportunity for you to propose projects that support broader, original ideas that align with the USDA Farm to School Grant Program goals and objectives. USDA releases a request for applications (RFA) in the fall and announces awards in the early summer. Visit the USDA [Farm to School Grant Program’s](#) website for more information.

For more details on how to implement the steps and strategies needed to grow your local foods program, check out USDA’s [Procuring Local Foods for Child Nutrition Programs guide*](#) and other [Procuring Local Foods](#) resources.

*The Institute of Child Nutrition also offers a [Procuring Local Foods for Child Nutrition Programs training](#) based on the above-mentioned USDA guide.

LOCAL FOODS SUCCESS STORY

Shannon FitzGerald, MS, RDN, LD

Five years ago, I attended a statewide, farm-to-community conference. Inspired by what I heard in a break-out session, I was energized and determined to bring local produce to our students. I noticed another participant, Brooke, who appeared equally motivated. We exchanged numbers to discuss our mutual interests.

Brooke turned out to be an apple and peach farmer with an orchard only 40 miles from our school district. Fruit is a great starter product for any farm-to-school program. However, logistics needed to be laid out. We diligently worked through all the details of product ordering (product specs, quantity, timing), delivery (one or multiple locations), and marketing. Both sides needed to be willing and flexible to develop processes that were mutually beneficial. Brooke also visited our schools and provided apple samplings and taste tests. We included the local health department in our planning sessions to address any food safety concerns. Our farm-to-school program was born!

After providing produce to Avon Lake City Schools and neighboring school districts, Brooke, along with the health department, submitted a grant application, and was awarded a USDA Farm to School Grant to help meet equipment needs, build an ordering platform, and produce new marketing materials.

Avon Lake City Schools didn't stop their farm-to-school efforts with apples and peaches. We had an interest in other local product offerings. Brooke spoke with other local farmers that were interested in serving schools. The farmers were then invited to the regional food buying co-op. With all the partners at the table (school districts, farmers, and the buying co-op representative), we set product specs so that the farmers could submit bid pricing. Our district and many others now receive tomatoes, hydroponic lettuce, peppers, watermelon ... and sometimes even surprises, like multi-colored carrots!

Looking back, I'm amazed at all we have accomplished. We achieved our goals through constant networking, connecting the dots, sharing ideas, and partnering with like-minded people and organizations.

Avon Lake City Schools District Profile

Location:
Avon Lake, Ohio

Enrollment:
3,800+; 4 elementary schools,
2 middle schools, 1 high school

Website:
[Avon Lake City Schools](http://www.avonlakeschools.org)



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COOPERATIVE PURCHASING GROUPS

School food authorities (SFAs) can enter into different types of purchasing agreements to procure the products and services needed to operate their school nutrition programs. If you're having difficulty identifying, procuring, and receiving affordable lower-sodium products and other products and services for your program operations, consider joining a **cooperative purchasing group (CPG)**. Understanding the benefits and challenges of belonging to a CPG can help you determine if it is the best option for your SFA.

COOPERATIVE PURCHASING

In school nutrition, **cooperative purchasing** is an agreement to collectively pool the purchasing power of SFAs to competitively procure some or most of the products and services needed to operate a school nutrition program. Most commonly, this agreement is between a group of SFAs. Cooperative purchasing is particularly advantageous for small- to medium-sized SFAs needing volume cost savings.



SFA CPGs use their collective purchasing power and expertise to reduce food, supply, labor, and administrative costs. In addition, SFA CPGs are used to improve the quality and types of products (including low-sodium!) and services available to member school nutrition programs. SFA CPGs operate using procurement procedures that comply with the most restrictive Federal, State, and local requirements.

Although rare, a **cooperative purchasing agreement** may be between a Child Nutrition Program (CNP) State agency and their respective SFAs. In this case, the State agency procures products and services on behalf of their SFAs. SFAs are then allowed to purchase from the CNP State agency's procured sources without further competition if the State agency follows the Federal procurement regulations.

BENEFITS OF COOPERATIVE PURCHASING

Cost savings is generally viewed as the most significant benefit of belonging to a CPG. Moreover, increased purchasing volume and power, the ability to network, and reduced administrative burden provide additional advantages.

INCREASED PURCHASING VOLUME AND POWER

CPGs negotiate purchasing contracts as one large entity. Combined purchasing volume provides an opportunity for:

- Lower prices
- A wider range of products to select from
- Higher quality products with more favorable pricing

Combined purchasing power increases the ability to purchase large volume items, such as [USDA Foods](#) products or products directly from the manufacturer. In addition, CPGs often obtain products from local producers and processors. Purchasing from these alternative procurement sources often provides considerable cost savings.

SODIUM REDUCTION SPOTLIGHT: PURCHASING POWER AND VOLUME

CPGs can leverage their purchasing power to:

- Demand more availability and/or the development of lower-sodium products
- Potentially receive lower prices on more obscure school-appropriate lower-sodium products
- Request volume purchases of lower-sodium products made to specification directly from a manufacturer

Are you currently able to or interested in procuring large volume items? In the following table, indicate your current utilization of the listed procurement sources and your interest in utilizing them through a CPG:

Procurement Source	Currently utilizing as an individual SFA		Interested in utilizing through a CPG	
	Yes	No	Yes	No
USDA Foods	Yes	No	Yes	No
Direct from manufacturer	Yes	No	Yes	No
Local producers/processors	Yes	No	Yes	No

NETWORKING

Membership in a CPG is an excellent opportunity for you to network and share information with other SFAs about products, distributors, successful menus, innovative ideas, and solutions to common issues. In addition, as a newer member, you benefit from the knowledge of more experienced school nutrition directors.

The combined knowledge and sharing among CPG members increases the availability of various menu items and influences the quality of meals, contributing to customer satisfaction and increased program participation.

REDUCED ADMINISTRATIVE BURDEN

Belonging to a CPG allows you to avoid time-consuming tasks and administrative burdens of procurement-related functions (for example, researching and developing specifications, preparing solicitation documents, evaluating, awarding, and managing contracts) and focus your attention on other responsibilities.

**Sodium Reduction Spotlight:
Reduced Administrative Burden**

Saves members time researching and developing specifications for lower-sodium products.

CPGs often utilize a prime distributor, which reduces deliveries, invoices, paperwork, payments processed, labor, and administrative costs for member SFAs.

Cooperative purchasing is particularly advantageous for small- to medium-sized SFAs in need of a volume cost savings. Belonging to a CPG can also ease the administrative burden of procurement-related functions for school nutrition directors who serve multiple roles, such as supervisor, nutritionist, accountant, personnel manager, menu planner, and food purchaser. Additionally, in rural areas, purchasing groups are often more successful than individual SFAs in attracting vendors willing to deliver to their locality.

CHALLENGES OF COOPERATIVE PURCHASING GROUPS

While joining a CPG may be advantageous for some SFAs, membership in a purchasing cooperative is not the right solution for all. Some challenges include *product consensus*, *administrative costs*, *delivery options*, and *storage capacity*.

PRODUCT CONSENSUS

CPGs often have opportunities to procure a broader range of products and higher quality menu items than what can be procured by an individual SFA. Higher quality products may drive increased student participation in school meals, which may offset food costs. However, you need to be willing to compromise with other group members on what products to procure. This compromise means that you MAY need to replace current products with higher quality versions (potentially increasing your food costs) OR eliminate certain items from your menu.

Use the table on the next page to think through product compromises you may need to make in your menu.

Product Consensus Brainstorm

In the table below, list your students’ favorite menu items. Then, indicate your willingness to purchase a higher quality item (at a potentially higher cost) or eliminate it from your menu. Joining a CPG doesn’t mean that these favorite menu items will no longer be available, but the possibility should be considered.

What are your students’ favorite menu items? Please list below.	Willingness to purchase a higher quality item (at a potentially higher cost)					Willingness to eliminate this item from the menu				
	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5

1=not willing, 2=somewhat not willing, 3=undecided, 4=somewhat willing, 5=willing

ADMINISTRATIVE COSTS

There are often costs associated with participating in a CPG. For example, you may be required to pay an initiation or application fee, annual administrative and/or membership fees, additional delivery fees, and/or penalties (typically related to order omissions/additions). When exploring a CPG, ask the Group’s officers or designated representative about membership fees and other requirements (that may incur additional costs) to participate.

If you are considering joining an existing CPG, be sure to calculate and compare the cost of procuring through the CPG to the cost of procuring on your own. Fees may offset the potential savings of increased purchasing power.

Your cost analysis must consider:

CPG fees + CPG cost per purchase unit of food product vs. non-CPG cost per purchase unit of food product

DELIVERY OPTIONS & STORAGE CAPACITY

The number of deliveries and delivery locations significantly impact pricing. Belonging to a CPG raises the possibility of receiving larger and less frequent deliveries, which is more cost-effective for the group. Check your dry and cold storage spaces to see if you can accommodate an increase in delivery volume.

Let’s look at your current delivery schedule. Use the following table (or create your own) and list when and where your distributors deliver their products.

	Distributors	Products	Sites
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			

Next, refer to your schedule to think through the following delivery and storage considerations.



You may need to purchase or rent additional storage equipment or space if your SFA can't accommodate an increase in delivery volume. Be sure to calculate and compare the savings gained as a member of the CPG to the cost of acquiring additional storage equipment or space.

Every SFA is unique and has different procurement needs. Therefore, membership in a CPG requires careful consideration.

What are the perceived BENEFITS of your SFA belonging to a CPG?

- 1.
- 2.
- 3.

What are the perceived CHALLENGES of your SFA belonging to a CPG?

- 1.
- 2.
- 3.

The *Participant's Workbook* included with the ICN training, "[Procurement of Foods: Cooperative Purchasing Groups](#)," provides more detailed information about CPGs. It also outlines the next steps to take and questions to ask when thinking about joining or forming a CPG.

Recognizing the benefits and challenges of cooperative purchasing and your SFA's needs are the first steps in determining if it is the best option for your SFA. Reflect on how belonging to a CPG may help you meet the sodium limits.

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10/04/2024




WORKING WITH YOUR PROCUREMENT PARTNERS

As a school nutrition operator, you may be responsible for procurement or support the process. Effectively communicating and collaborating with your procurement partners can help you plan and serve meals consistent with the meal patterns and dietary specifications **AND** appeal to your students.

PROCUREMENT PARTNERS


Procuring lower-sodium foods for school meals is a process that requires open communication and collaboration among everyone in the school food supply chain. As the School Food Authority (SFA), you are responsible for the proper use of school nutrition program funds to provide nutritious foods to students. You (and/or your cooperative purchasing group) may source food from distributors, manufacturers, local producers, the USDA Foods in Schools Program (USDA Foods), and the USDA Department of Defense Fresh Fruit and Vegetable Program (USDA DoD Fresh).

Distributors, Manufacturers, and Brokers
You primarily work with **distributors** to acquire lower-sodium products. However, it can also be helpful to reach out to **manufacturers** who may be willing to develop lower-sodium products to your specification. **Brokers** note your needs and work with distributors and manufacturers to find and develop lower-sodium products.




Local Foods
Cultivating your menu with foods directly from **local producers** can help you replace higher-sodium menu items.




 **USDA Foods** can be your partner in acquiring produce, foods, and food products that will help you lower the sodium content of your meals. USDA Foods are available through three ordering options:


USDA Foods Direct Delivery
USDA Foods that are available for direct delivery are held to lower-sodium standards. USDA manages the specifications of direct delivery USDA Foods and has made sodium levels as low as possible across the spectrum of foods available. USDA Foods may be lower in sodium than what you are sourcing commercially.



USDA Foods Processing
Multi-state commercial processors (**manufacturers**) or **in-state processors** convert USDA Foods bulk items into products. While USDA sets nutrition standards for the bulk ingredients themselves, processed end products are not guaranteed to be lower in sodium. It is the responsibility of the SFA to evaluate available processed end products for sodium and other nutrition criteria.



USDA DoD Fresh
The government leverages its buying power by contracting with (**local**) **producers** for weekly deliveries of a wide variety of fresh produce, which is naturally low in sodium.



PROCURING LOWER-SODIUM PRODUCTS

Brokers, distributors, and manufacturers, collectively known as vendors, want your business and want to work with you. They want to know what products you are looking for and want to hear feedback regarding their products' quality and acceptance from students. Below are a few pointers to make the most of your conversations with vendors.

Check out the *Scoping Out Sodium in School Menus* and *Sodium Swaps: Utilizing Product Substitution* worksheets on ICN's [Shaking It Up!](#) website to learn more about identifying products lower in sodium.

1 Prepare to speak with vendors ahead of time by:

- **Evaluating your menu.** Familiarize yourself with the sodium levels of your current products and recipes. Identify the highest-sodium contributors in your menu.

Use a cycle menu to help you analyze:

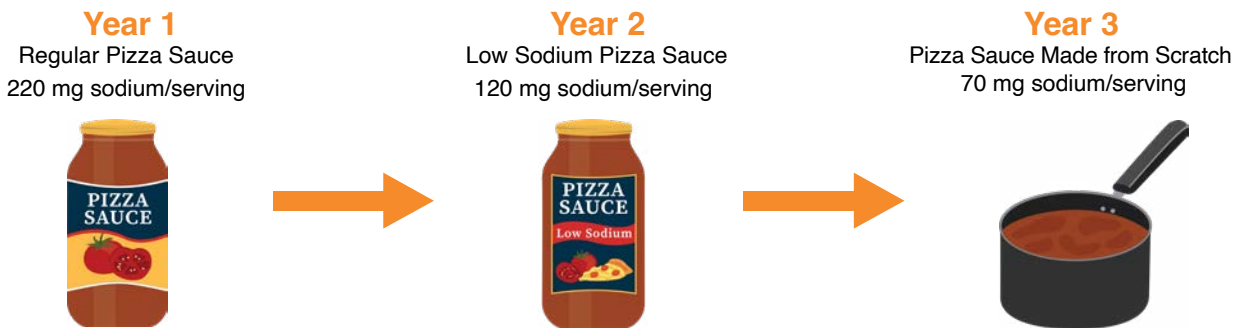
- The type and frequency of menu items you offer,
- Similarities among products needed for recipes, and
- Menu items and recipes that contribute the most sodium in a weekly menu.

A cycle menu allows you to “plug and play” menu items into different daily and weekly menus to see how they impact sodium totals.

Highest-Sodium Contributors

- Menu items with high sodium amounts per serving, such as:
 - Pizza
 - Cheese
 - Chicken patties, nuggets, tenders
- Frequently offered menu items with nominal-to-moderate sodium amounts per serving, such as:
 - Salad dressings
 - Ketchup
 - Commercially-prepared salsa

- **Setting sodium limits.** Set the sodium levels of your current products and recipes as your initial maximum sodium limits. During each procurement cycle, substitute a subset of your highest-sodium contributors with those that are slightly lower in sodium. Use the new sodium levels as your new maximum sodium limits for the next procurement cycle. Let your brokers and vendors know that you will not consider any products above your maximum sodium limits. This approach reduces your weekly sodium totals gradually over time. Your students will be less likely to notice any taste differences!



- **Conducting market research.** Products that are high in sodium are typically commercially processed, packaged, and prepared foods.* The range of sodium in these products can be quite large. Obtaining the information you need about lower-sodium product options is an ongoing effort as it can become frequently outdated due to:
 - Product information not being readily available,
 - Varying product ingredients and formulations by different manufacturers, and
 - Rapidly changing manufacturing processes.

When engaging in market research, it's important to know **WHO** to reach out to and identify how they can help with procuring lower-sodium products. What do they have to offer?

*The U.S. Food and Drug Administration (FDA) defines *“commercially processed, packaged, and prepared foods”* as “processed multiple-ingredient foods that have been packaged for direct sale to consumers, for use in food establishments including, but not limited to, restaurants or for resale to other members of the food industry, as well as foods that are prepared by food establishments for direct consumption.”

In the following table, review potential vendors and questions to ask to help you obtain lower-sodium products:

Current/New Vendors	Manufacturers
<ul style="list-style-type: none"> • Do you provide a low sodium version of [product] or a similar product that is lower in sodium? • What is the product's cost and availability? • Is it a special order? • Do you have any product recommendations? If a broker or vendor approaches you with new lower-sodium products, be sure to ask for: <ul style="list-style-type: none"> • Product catalogs • Nutrition information • Taste-testing samples to use with students • Brochures • Crediting information • We identified via [another school district, trade show, catalog, etc.] that you carry [low sodium product]. Would you be interested in working with our school district? 	<ul style="list-style-type: none"> • We are interested in having you make [low sodium product] for our school district. Would you be willing to discuss the specification, amount, pricing, timing, and delivery? <i>Solicitations must be open and competitive if above the micro-purchase threshold level.</i>
<p>In addition, consider:</p> <ul style="list-style-type: none"> • Replacing heat-and-serve food products with a recipe to prepare in the kitchen. Research standardized recipes for the desired food product to add as a menu item. Check out the Child Nutrition Recipe Box (CNRB) to get started! • Working with your State agency to determine if there are USDA Foods direct-delivered products that could be a lower-sodium alternative to a product you are currently sourcing commercially. 	

2 Discuss your menu needs with vendors.

After evaluating your menu, setting sodium limits, and conducting market research, you are ready to speak with your brokers or vendors. Share your findings from your market research and ask if they know of low sodium products that might fit your menu needs. Brokers and vendors can help find lower-sodium versions of products, or alternative lower sodium foods similar to those on your current menu. After identifying lower-sodium product options, compare the sodium amount, serving size, unit price, and meal contribution of each product.

If you are looking to **substitute** current menu items with similar, lower-sodium versions, be sure to provide the current products':

- Name
- Description
- Sodium amount
- Serving size
- Crediting information

Consider the following lower-sodium cheese pizzas:

Nutrition Facts	
8 servings per container	
Serving size	1 Slice (149g)
Amount Per Serving	
Calories	280
<small>% Daily Value*</small>	
Total Fat 7g	9%
Saturated Fat 3g	15%
Trans Fat 0g	
Cholesterol 15mg	5%
Sodium 470mg	20%
Total Carbohydrate 39g	14%
Dietary Fiber 4g	14%
Total Sugars 4g	

While the serving sizes are the same, the sodium amounts and crediting for meats/meat alternates and grains are different. You would need to consider how each pizza impacts your weekly menu in terms of total sodium and meal pattern component contribution.

Nutrition Facts	
8 servings per container	
Serving size	1 Slice (156g)
Amount Per Serving	
Calories	360
<small>% Daily Value*</small>	
Total Fat 16g	21%
Saturated Fat 9g	45%
Trans Fat 0g	
Cholesterol 35mg	12%
Sodium 540mg	23%
Total Carbohydrate 34g	12%
Dietary Fiber 2g	7%
Total Sugars 4g	

Each 5.26 oz. portion of Cheese Pizza provides **1.50 oz eq meats/meat alternates, 2.75 oz eq grains,** and 1/8 cup red/orange vegetable for the Child Nutrition Meal Pattern Requirements. [Use of this logo and statement authorized by the Food and Nutrition Service, USDA MM/YY].

Each 5.49 oz. portion of Cheese Pizza provides **2.00 oz eq meats/meat alternates, 2.00 oz eq grains,** and 1/8 cup red/orange vegetable for the Child Nutrition Meal Pattern Requirements. [Use of this logo and statement authorized by the Food and Nutrition Service, USDA MM/YY].

3 Seek student input!

Before substituting a menu item for a lower-sodium product, it's essential to seek student input. The lowest cost lower-sodium product may not be the tastiest option for your students. If your students won't eat it, it's not a suitable replacement!

Taste-testing activities and surveys can provide you with valuable feedback and help gain student acceptance of lower-sodium menu items. Utilize vendors to support you with taste testing. Generally, you can request a few product samples from your vendors at no cost—you just need to ask! They may even want to be onsite the day of testing to prepare samples for serving students in the serving line or eating area.

Check out [Team Nutrition's Popular Events Idea Booklet](#) to help you plan a taste-testing event for elementary or middle school students!

PROCURING LOWER-SODIUM PRODUCTS CHECKLIST

Use the checklist provided below to help you procure the best-tasting lower-sodium products from your vendors.

Evaluate your menu

- Familiarize yourself with sodium levels of all products and recipes in your menu
- Identify the highest-sodium contributors
- Set maximum sodium limits for all products
- Identify a subset of your highest-sodium contributors to replace with lower-sodium versions

Conduct market research to familiarize yourself with potential lower-sodium substitutes

Discuss menu needs with vendors

- Notify vendors of maximum sodium limits
- Share which menu items or products you are looking to substitute with lower-sodium versions
- Share findings from market research
- Identify lower-sodium product options

Seek student input

- Reach out to vendors to obtain samples
- Implement taste-testing activities and surveys

Incorporate new products and recipes into menu

- Set new maximum sodium limits

PROCUREMENT PARTNERS SUCCESS STORY

Nancy Coughenour, MS, RD, LD, SNS

Nancy Coughenour, recently retired Food Service Director of Shawnee Mission School District, began the journey of offering lower-sodium school meals over 15 years ago. Nancy’s primary sodium reduction strategy was to evaluate the sodium content of products in her menu and recipes and compare them to potential new products every procurement cycle. The goal for each product was to never go higher in sodium than its current level and, when feasible, continue to move it downward. Nancy’s individual product approach gradually reduced the overall sodium content of their menus through the years. Shawnee Mission has met the sodium target 2 levels with no significant challenges or student outcry.

Shawnee Mission School District Profile

Location: Shawnee Mission, Kansas

Enrollment: 27,500+ students;
34 elementary schools,
5 middle schools,
5 high schools

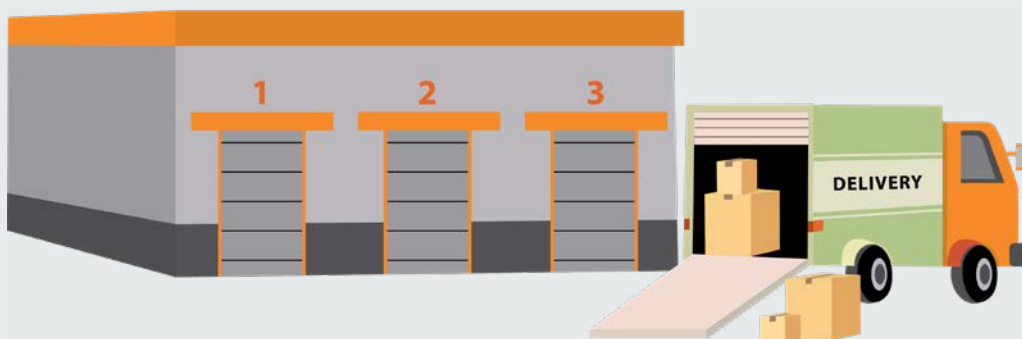
Website: [Shawnee Mission School District](http://ShawneeMissionSchoolDistrict)

Of course, part of this sodium reduction journey involved working with her procurement partners, particularly manufacturers. She did this by talking to representatives directly during school visits and at school nutrition food and trade shows. Nancy explains, *“Every time I saw a manufacturing representative, I provided them feedback– ‘Yes, we like your product, and this is why,’ or ‘No, we won’t use your product, and this is why.’ I was very specific and a little blunt at times. For certain products [that tended to be higher in sodium, like potatoes], I would show them that they needed to be at or below a certain sodium level to be considered if a company wanted my business. We would not go backward, and I would tell them that.”*

In addition to direct verbal feedback, Nancy also provided manufacturers with taste-test data of products she was willing to consider using in her program. Her managers sampled about 200 products with their students across all demographics and grade levels in a regular school year. For each product, she tracked the vendor that brought it in, the manufacturer, meal contribution, and nutrient data, in addition to the student feedback, and provided that information to the manufacturers.

Nancy’s relationship with manufacturers is just one example of how school nutrition operators can work with their procurement partners to reduce sodium in school meals. Her parting words of wisdom, *“As a food service director, you need to do what is right for kids. If manufacturers and brokers hear [the need for lower-sodium products] enough, they’ll take it back to their manufacturing plants and make the product.”*

Work with your vendors to plan, procure, and serve meals that are lower in sodium and appeal to your students!



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WRITING SPECIFICATIONS THAT LIMIT SODIUM

Prior to planning menus for your school nutrition program, it is important to write specifications that clearly identify the products and the nutrition standards for sodium that you want to purchase from distributors and/or manufacturers. Understanding the different methods to write a nutrition standard for sodium within a product specification—and when to use them—allows you to procure products that achieve menus below the weekly sodium limits.

PRODUCT SPECIFICATIONS FOR USE IN A COMPETITIVE PROCUREMENT PROCESS

A **specification** is a description of the *characteristics* you are seeking in a food product.

The product type determines the characteristics to include in a specification, including if it *requires* or *should include* a **nutrition standard**. Examples of product types include:

- Fresh produce
- Milk
- Fresh meat, poultry, and fish
- Commercially processed, packaged, and prepared foods*

Nutrition standards are required for certain products, such as:

- Milk [must be fortified with vitamins A and D, fat-free (skim), or low-fat (1%)]* and
- Grains [must be whole grain-rich or enriched].

Including nutrition standards in the product specifications of foods can help you meet the National School Lunch Program (NSLP) and School Breakfast Program (SBP) dietary specifications, which **limit** calories, sodium, and the percentage of calories from saturated fat.**

*Flavored milk, breakfast cereals, and yogurt will have an added sugars nutrition standard beginning July 1, 2025.

**A limit on the percentage of calories from added sugars must be implemented by July 1, 2027.



Examples of Specification Characteristics

- Product name
- Product description
 - Type
 - Cut, shape
 - Portion size
 - Precooked weight
 - Frozen, fresh, or dry
- Brand name
 - Manufacturer's name, description, code number, pack size
 - "Pre-approved equal" wording
- Case pack and weight
- Main ingredients
- Other product ingredients
- Prohibited ingredients
 - For example, food additives, artificial colors and flavors, food allergens
- Minimum and maximum sizes and pieces
- Unit on which award is made
- Quality indicators
 - Standards of Identity (SOIs)
 - USDA Grades and Standards
- Meal pattern equivalents
 - Child Nutrition (CN) label
 - Product Formulation Statement (PFS)
- Nutrition standards
 - For example, limits on calories, sodium, saturated fat; milk vitamin fortification and fat content; zero grams added *trans* fats
- Buy American

*The U.S. Food and Drug Administration (FDA) defines "*commercially processed, packaged, and prepared foods*" as "processed multiple-ingredient foods that have been packaged for direct sale to consumers, for use in food establishments including, but not limited to, restaurants or for resale to other members of the food industry, as well as foods that are prepared by food establishments for direct consumption."

The product type also determines *which* nutrition standards to address in your product specifications. Consider including a nutrition standard to limit **sodium** in specifications for commercially processed, packaged, and prepared foods such as:

- Bread products
- Canned vegetables and legumes
- Condiments
- Heat-and-serve entrées
- Potato products
- Processed meats*
- Tomato-based products
- Seasoned/flavored vegetables

*The [Dietary Guidelines for Americans, 2020–2025](#) considers processed meats to include hot dogs, sausages, ham, and luncheon meats.

WRITING SPECIFICATIONS THAT LIMIT SODIUM

There are three different approaches to writing sodium nutrition standards within your product specifications:

Sodium Nutrient Claims

Lower-sodium versions of products—primarily canned/bottled goods and some frozen goods—are often labeled with U.S. Food and Drug Administration (FDA) sodium nutrient claims such as “Low Sodium,” “Reduced Sodium,” or “No Salt Added.” These products **may** offer lower-sodium versions of the food products you currently use. You can use these claims as your nutrition standard for sodium within a specification.

ICN's [Sodium Swaps: Utilizing Product Substitution](#) worksheet provides more information on FDA sodium nutrient claims.

Comparing Low Sodium Nutrient Claims

It's important to note that one brand's "Low Sodium" product may be higher or lower in sodium than another brand's product labeled "Low Sodium." As long as both brands' products are equal to or less than 140 mg sodium per serving, they can both use the nutrient claim "Low Sodium." Keep in mind these possible sodium amount differences when comparing similar sodium nutrient claims between brands. For example, depending on the popularity of the product and the frequency in which it is used, offering a low-sodium product with 100 mg sodium per serving versus 140 mg sodium per serving can make a difference in your menu's weekly sodium total. Use the Nutrition Facts label to compare the milligrams of sodium per serving (and the serving size) across commercial brands to identify which products are lower in sodium.

Smart Snacks Compliant

Similar to using a sodium nutrient claim, indicating “Smart Snacks compliant” in the specification is another method to limit sodium—it will also limit the total calories, saturated fat, *trans* fats, and added sugars in a product. “Smart Snacks” entrées and side items are limited to ≤ 480 mg and ≤ 200 mg of sodium per item, respectively. Please refer to USDA's [A Guide to Smart Snacks in Schools](#) for more detailed information on Smart Snacks.

Maximum Sodium Limit

When products do not qualify for or are not labeled with a sodium nutrient claim, OR when you want to procure a product that falls at or below a specific sodium amount, it's best to include a maximum sodium limit as the nutrition standard within the specification. Determining the sodium limit requires product and menu analysis. The U.S. Food and Drug Administration's (FDA) [Guidance for Industry: Voluntary Sodium Reduction Goals](#) may prove helpful in determining maximum sodium limits for certain products. Once you know your limit, you can insert it within the specification with variations of the following terms:

Refer to ICN's [Working With Your Procurement Partners](#) worksheet for more information about procuring lower-sodium products.

“No more than,” “May not exceed,” or “A maximum limit of”
XYZ mg of sodium per serving

EXAMPLES OF PRODUCT SPECIFICATIONS THAT LIMIT SODIUM

Writing specifications is an important aspect of the procurement process. Below are examples of *partially* written product specifications for use in formal or informal procurement documents.* They demonstrate how to limit sodium using the three different approaches previously described.

USE SODIUM NUTRIENT CLAIMS

GREEN BEANS, Cut, Canned, Grade B or better, **Low sodium**.

CARROTS, Diced, Frozen, Grade A, **No salt added**.



REQUIRE PRODUCTS TO MEET SMART SNACKS REQUIREMENTS

BAGEL, BLUEBERRY, Sliced. First and primary ingredient must be whole grain. The product must contain at least 50% whole grain content. **Smart Snacks compliant** (2.00 oz. equivalent Grains). Product Formulation Statement preferred.

GRANOLA, CINNAMON, Individually wrapped. First and primary ingredient must be whole grain. The product must contain at least 50% whole grain content. **Smart Snacks compliant** (1.00 oz. equivalent Grains). Product Formulation Statement preferred.

DEFINE MAXIMUM SODIUM LIMIT

BURRITO, BEAN & CHEESE, Fully cooked, IQF. Pinto and black bean burrito on a whole grain-rich tortilla. Cannot contain beef, poultry, pork, or fish by-products or MSG. Must contain between 300–350 calories, less than 10% calories from saturated fat, zero trans fat, and **may not exceed 500 mg of sodium per individual portion** (1.00 oz. equivalent M/MA, 1.50 oz. equivalent Grains). CN label or Product Formulation Statement required.

CHICKEN NUGGETS, Breaded, Fully cooked, IQF. **Maximum limit of 400 mg of sodium per 5 piece portion** (2.00 oz. equivalent M/MA, 1.00 oz. equivalent Grains). CN label or Product Formulation Statement required.

PIZZA, CHEESE, Sliced, Frozen. Whole grain crust, 100% real cheese (no imitation). **No more than 500 mg of sodium per portion slice** (2.00 oz. equivalent M/MA, 2.00 oz. equivalent Grains, 1/8 cup R/O Veg). CN label or Product Formulation Statement required.



POTATOES, FRENCH FRIES, Seasoned, Frozen, Ovenable, 1/2" Crinkle cut, Low moisture, U.S. Grade A. Processed in vegetable oil. **No more than 200 mg of sodium per 1/2 cup serving**.

TOMATO, SAUCE, Marinara, Dipping cups. No HFCS. **May not exceed 200 mg of sodium/2.5 oz individual portion cup**. Minimum 9 months shelf life from production.

TORTILLA, FLOUR, 8", Whole grain-rich. **Maximum limit of 225 mg of sodium per portion** (1.50 oz. equivalent Grains). Product Formulation Statement preferred.

**These examples are not intended to endorse desired sodium limits for certain types of products. Lower-sodium versions of some products are available.*

WRITING NUTRITION STANDARDS THAT LIMIT SODIUM

Now it’s your turn to consider sodium nutrition standards for the higher-sodium products used in your menu. In the table below, list one product from your menu that fits within each category and review the specification used in your competitive procurement process. Then, write a new sodium nutrition standard you could incorporate into the specification the next time you are ready to competitively procure the product. Learn more about the market research and other steps needed to specify a maximum sodium limit in ICN’s [Working With Your Procurement Partners](#) worksheet.

Names of Products	Sodium Nutrition Standard
<i>Bread product</i>	
<i>Canned vegetable or legume</i>	
<i>Condiment</i>	
<i>Flavored/seasoned vegetables</i>	
<i>Heat-and-serve entrée</i>	
<i>Potato product</i>	
<i>Processed meat</i>	
<i>Tomato-based product</i>	

Including nutrition standards that limit sodium in your written specifications is a strategy that will help you procure lower-sodium products.

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LINKS

RESOURCE TITLE	LINK
A Guide to Smart Snacks in Schools	https://www.fns.usda.gov/tn/guide-smart-snacks-school
Child Nutrition Programs: Meal Patterns Consistent With the 2020-2025 Dietary Guidelines for Americans, 7 C.F.R § 210, 215, 220, 225, 226 (2024)	https://www.federalregister.gov/documents/2024/04/25/2024-08098/child-nutrition-programs-meal-patterns-consistent-with-the-2020-2025-dietary-guidelines-for
Child Nutrition Recipe Box (CNRB)	https://theicn.org/cnrb/
Cooperative Purchasing Groups	https://theicn.org/resources/1616/worksheets/123110/cooperative-purchasing-groups.pdf
Engaging Students in Menu Development	https://theicn.org/shaking-it-up/
Farm to School Grant Program	https://www.fns.usda.gov/cfs/farm-school-grant-program
Guidance for Industry: Voluntary Sodium Reduction Goals	https://www.fda.gov/regulatory-information/search-fda-guidance-documents/guidance-industry-voluntary-sodium-reduction-goals
ICN's Ground Rules for Training	https://theicn.org/icn-resources-a-z/ground-rules-for-training-mini-posters/
Incorporating Local Foods in School Nutrition Programs	https://theicn.org/resources/1616/worksheets/123032/incorporating-local-foods-in-school-nutrition-programs.pdf
Land-Grant University-Extension	https://nifa.usda.gov/land-grant-colleges-and-universities-partner-website-directory
Nutrition Standards in the National School Lunch and School Breakfast Programs (77 FR 4088)	https://www.federalregister.gov/documents/2012/01/26/2012-1010/nutrition-standards-in-the-national-school-lunch-and-school-breakfast-programs
Popular Events Idea Booklet	https://www.fns.usda.gov/tn/popular-events-idea-booklet
Montana's "Harvest of the Month" program	https://mtharvestofthemoth.org/
Procurement of Foods: Cooperative Purchasing Groups	https://theicn.org/icn-resources-a-z/procurement-of-foods-cooperative-purchasing-groups
Procurement Federal Regulations: 7 CFR 210.21 and 2 CFR 200.318-326	https://www.ecfr.gov/current/title-7/subtitle-B/chapter-III/subchapter-A/part-210/subpart-E/section-210.21 https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/subject-group-ECFR45ddd4419ad436d/section-200.318
Seasonal Produce Guide	https://snaped.fns.usda.gov/seasonal-produce-guide

RESOURCE TITLE	LINK
Shaking It Up: Small Changes Lead to Big Flavors	https://theicn.org/shaking-it-up/
Sodium Sways: Utilizing Product Substitution	https://theicn.org/shaking-it-up/
Successful Approaches to Reduce Sodium in School Meals	https://www.fns.usda.gov/nsip/successful-approaches-reduce-sodium-school-meals-study
Transitional Standards for Milk, Whole Grains, and Sodium (87 FR 6984)	https://www.federalregister.gov/documents/2022/02/07/2022-02327/child-nutrition-programs-transitional-standards-for-milk-whole-grains-and-sodium
USDA Census of Agriculture	https://www.nass.usda.gov/AgCensus/
USDA DoD Fresh	https://www.fns.usda.gov/usda-foods/usda-dod-fresh-fruit-and-vegetable-program
USDA Farm to School Census	https://farmtoschoolcensus.fns.usda.gov/
USDA Foods Available List	https://www.fns.usda.gov/usda-foods/usda-foods-expected-be-available
USDA Foods in Schools	https://www.fns.usda.gov/usda-fis
USDA Foods Product Information Sheets	https://www.fns.usda.gov/usda-fis/usda-foods-product-information-sheets
Utilizing USDA Foods and USDA DoD Fresh Programs	https://theicn.org/resources/1616/worksheets/123031/utilizing-usda-foods-and-usda-dod-fresh-programs.pdf
Working With Your Procurement Partners	https://theicn.org/resources/1616/worksheets/123831/working-with-your-procurement-partners.pdf
Writing Specifications That Limit Sodium	https://theicn.org/resources/1616/worksheets/123177/writing-specifications-that-limit-sodium.pdf





Procuring Lower-Sodium Products Checklist

Instructions: Use the checklist to help you procure the best-tasting lower-sodium products from your vendors.

Evaluate your menu

- Familiarize yourself with sodium levels of all products and recipes in your menu
- Identify the highest-sodium contributors
- Set maximum sodium limits for all products
- Identify a subset of your highest-sodium contributors to replace with lower-sodium versions

- Conduct market research to familiarize yourself with potential lower-sodium substitutes

Discuss menu needs with vendors

- Notify vendors of maximum sodium limits
- Share which menu items or products you are looking to substitute with lower-sodium versions
- Share findings from market research
- Identify lower-sodium product options

Seek student input

- Reach out to vendors to obtain samples
- Implement taste-testing activities and surveys

Incorporate new products and recipes into menu

- Set new maximum sodium limits

Grow Your Local Foods Menu Action Plan Handout

As you consider incorporating local foods into your school menu, it can be helpful to set a goal and develop an action plan. Use the template below as a guide for your own local foods goal and plan for the next school year. Please note the provided example includes only some of the milestones you would need to reach to achieve the stated goal.

Goal (measurable and specific): By the _____ school year, substitute three (3) menu items or ingredients within recipes with lower-sodium locally-sourced products.

MILESTONE What will you do to achieve the expected outcome?	PERSON RESPONSIBLE	TARGET DATE	DATE COMPLETED
Determine what "local" means to your school district.			
Find out what local products are available to you and when they are in season.			
Identify three menu items and/or ingredients within recipes that can be substituted with lower-sodium products.			
Adjust three menu items and/or recipes to incorporate lower-sodium products.			



Examine Your SFA's Needs Worksheet

Instructions: Ask yourself the following questions about your current procurement procedures and write your answers in the spaces provided. As you examine your current system, think about how changing delivery methods would affect your school nutrition operations. This template is designed as a tool and should be modified to meet your SFA's needs.

What is your current delivery schedule? Write down which items (such as produce, dairy, paper goods, etc.) you receive on which days of the week and from which vendors.

Monday:

Wednesday:

Friday:

Tuesday:

Thursday:

How would more or less frequent deliveries affect your daily operations?

Do you need items delivered to multiple sites within your SFA? (YES or NO) What are the different sites?

Does your SFA have any specific time constraints or limitations for deliveries? (YES or NO) If so, what are they? Are there ways to ease those constraints or limitations?

If you could only have products delivered to a central location, would you be able to distribute them effectively? (YES or NO) How would you accomplish this?

What is the current storage capacity of your facilities, relative to the size of the deliveries you are currently receiving? Could you accommodate larger deliveries? (YES or NO) If so, how much larger volume can you accommodate?

Would additional shelving, freezers, etc., need to be purchased to accommodate larger deliveries? (YES or NO) If so, how much additional equipment would you need, and what would be the cost?

What are some of the student's favorite menu items? Would your SFA be willing to purchase a higher quality item for these products or eliminate the product from the menu? (YES or NO)



Evaluate and Compare Features of Cooperative Purchasing Groups Handout

Instructions: The questions included on this handout are designed to help an SFA evaluate and compare the features of cooperative purchasing groups. This template is only a tool, and SFAs should modify the template to meet their needs.

- What are the membership policies and requirements for fees, minimum purchase requirements, and contract terms of each group under consideration?
- Who manages the group effort? What is the organizational structure?
- Which other SFAs participate in this group? Are they similar? What do they see as benefits of membership? Are they satisfied with the group?
- How closely do the product offerings meet the needs of your SFA? Will the SFA need to solicit additional products?
- Is the delivery schedule suitable for your SFA? If not, would changing receiving and storage procedures in order to participate be an improvement or an obstacle?
- Are there penalties for mistakes and oversights? Is there a penalty if an item was omitted from the SFA's order or if an item was ordered but omitted from the delivery?
- Can small, familiar vendors provide services through this group?
- Is the contract cooperative using a fixed price or cost-reimbursable?
- Is the group administered in an ethical manner (complies with required code of conduct if a cooperative)? Does the group meet the legal and programmatic requirements of the school district? Does the group adhere to all Federal, State, and local regulations?

Writing Nutrition Standards That Limit Sodium Handout

Instructions: Consider sodium nutrition standards for the higher-sodium products used in your menu. In the table below, list one product from your menu that fits within each category and review the specifications used in your competitive procurement process. Then, write a new sodium nutrition standard you could incorporate into the specification the next time you are ready to competitively procure the product.

NAME OF PRODUCT	SODIUM NUTRITION STANDARD
Bread product	
Canned vegetable	
Condiment	
Flavored/seasoned vegetables	
Heat-and-serve entrée	
Potato product	
Processed meat	
Tomato-based product	



Comparing Vendor Products Handout

When comparing vendor products for school nutrition programs, it's important to consider criteria such as nutrition standards, taste and student acceptance, variety and diversity, and cost.

PRODUCT	PRODUCT 1:	PRODUCT 2:	PRODUCT 3:
NUTRITION STANDARDS			
TASTE AND STUDENT ACCEPTANCE			
VARIETY AND DIVERSITY			
COST			

SMART Goals Handout

A SMART goal is specific, measurable, achievable, relevant, and time-bound.

“S” stands for specific. State exactly what you want to accomplish. Ask yourself these questions:

- What do I want to accomplish?
- When will this happen?
- Where will this happen?
- Why am I setting this goal?

“M” stands for measurable. How will you evaluate whether or not you have met your goal? Ask yourself these questions:

- How much?
- How many?
- How will I know it's accomplished?
- What is the goal line?

“A” stands for achievable. Is your goal something you can accomplish? Ask yourself these questions:

- Am I prepared to make the commitment necessary to reach my target?
- Am I willing to make major changes in my routine and work environment?
- Do I need approval before major changes can be made?
- Is there a more achievable goal that I would be willing to work toward?

“R” stands for relevant. How does this goal align with your job responsibilities? Think about these questions:

- Do I have the resources I need?
- Does it make sense for my program?
- Does it align with my job responsibilities and staff needs?

“T” stands for time-bound. What timeframe would create a sense of urgency? Ask yourself:

- What can I do today to reach my goal?
- What can I do a week from now?
- What can I do a month from now?

To learn more about effective goal setting, visit <https://theicn.docebosaas.com> to enroll in our Effective Goals Setting Using SMART Goals iLearn course.



Action Plan

Instructions: Using the knowledge and skills you learned, complete the following application action plan.

List the most useful knowledge and/or skills you gained during this training.

What are some steps you can take to apply what you have learned?

What barriers do you think you might face at your job when trying to apply what you have learned from this training?

ASSESSMENT

1. Which of the following provides USDA Foods products available for the upcoming school year?
 - a. Snapshot of USDA DoD Fresh Produce
 - b. **USDA Foods Available List**
 - c. USDA Foods Product Information Sheets
 - d. Commodity Supplemental Food Program (CSFP)

2. Which of the following provides details such as product description and nutrition information for all USDA Foods?
 - a. Snapshot of USDA DoD Fresh Produce
 - b. USDA Foods Available List
 - c. **USDA Foods Product Information Sheets**
 - d. Commodity Supplemental Food Program (CSFP)

3. Which of the following should school nutrition programs contact to inquire about participating in USDA DoD Fresh?
 - a. USDA
 - b. USDA Foods
 - c. **State Distributing Agency**
 - d. School Food Authority (SFA)

4. Which is a description of “local“ when referring to local foods that may be incorporated into school nutrition menus? Select all that apply.
 - a. Certain mile radius from your school or school district
 - b. Changes throughout the year due to seasonal availability
 - c. Your county or your state
 - d. **All of the above**

5. Which is not a strategy to expand your local foods menu?
 - a. Adjust menus and recipes to incorporate local foods
 - b. **Procure agricultural commodities that are grown out-of-state**
 - c. Look for local foods to replace what you already offer on the menu
 - d. Develop an action plan

6. Which action should be taken first as you consider incorporating local foods into your school menu?
- Assign milestones to the person responsible
 - Develop an action plan
 - Set a goal**
 - Buy the food product
7. Which describes cooperative purchasing for school nutrition?
- An agreement to collectively pool the purchasing power of School Food Authorities (SFAs) to competitively procure some or most of the products and services needed to operate a school nutrition program
 - Collective purchasing power and expertise to reduce food, supply, labor, and administrative costs
 - Purchase of lower-sodium products made to specification directly from a manufacturer
 - All of the above**
8. Which choice is a benefit of cooperative purchasing?
- Costs associated with participating
 - Increased purchasing volume and power**
 - Product consensus
 - Decreased purchasing volume and power
9. Which choice is a challenge of cooperative purchasing?
- Decline in administrative burden
 - Increased purchasing volume and power
 - Product consensus**
 - Decreased purchasing volume and power
10. Which group is cooperative purchasing particularly advantageous for?
- School Food Authorities (SFAs) in rural areas
 - School nutrition directors who serve multiple roles
 - Small- to medium-sized School Food Authorities (SFAs)
 - All of these groups**

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The University of Mississippi
School of Applied Sciences

800-321-3054

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