

Forecasting the Procurement of Foods

Instructor's Manual

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Institute of Child Nutrition

The University of Mississippi, School of Applied Sciences

www.theicn.org

Key Area: Operations

USDA Professional Standards: 2400

INSTITUTE OF CHILD NUTRITION

THE UNIVERSITY OF MISSISSIPPI

The Institute of Child Nutrition was authorized by Congress in 1989 and established in 1990 at the University of Mississippi in Oxford and is operated in collaboration with The University of Southern Mississippi in Hattiesburg. The Institute operates under a grant agreement with the United States Department of Agriculture, Food and Nutrition Service.

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.

Institute of Child Nutrition

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- (1) Mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
- (2) Fax: (833) 256-1665 or (202) 690-7442; or
- (3) Email: program.intake@usda.gov

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Lessons-at-a-Glance

240 minutes, 4 hours

| Time | Topic | Task | Materials |
|---|--|--|--|
| Introduction | | | |
| 5 minutes | ■ Overview | ■ Introduce topic | ■ Slide Presentation ■ Participant's Workbook |
| 15 minutes | ■ Pre-Assessment ■ Introduction | ■ Distribute pre-assessment ■ Facilitate Icebreaker activity | ■ Slide Presentation ■ Participant's Workbook ■ Index Cards ■ Flip Chart Paper ■ Markers |
| 10 minutes | ■ USDA Professional Standards | ■ Review <ul style="list-style-type: none"> ○ USDA Professional Standards ○ Learning Objectives ○ Terms and Definitions ○ Planning | ■ Slide Presentation ■ Participant's Workbook |
| Lesson 1: Stakeholders | | | |
| Objective: Review stakeholders' responsibilities and expectations. | | | |
| 20 minutes | ■ Stakeholders | ■ Review and discuss the Stakeholders' Responsibilities handout ■ Review and discuss the Stakeholders' Tasks handout ■ Discuss lead time and receiving products ■ Review Lead Time handout ■ Facilitate Receiving Product activity ■ Review Procuring Timeline Example handout | ■ Slide Presentation ■ Participant's Workbook ■ Flip Chart Paper ■ Post It Notes ■ Markers |

Lessons-at-a-Glance, continued

| Time | Topic | Task | Materials |
|---|--|---|---|
| Lesson 2: Menus | | | |
| Objective: Discuss how the menu determines the goods and services that must be competitively procured. | | | |
| 45 minutes | <ul style="list-style-type: none"> ■ Menus | <ul style="list-style-type: none"> ■ Discuss <ul style="list-style-type: none"> ○ Menu ○ New items ○ Material change ○ Using common denominator units when listing products ○ Food Buying Guide Calculator ○ As Purchased and Edible Portion ○ Unit of measure and cost per serving ○ Updating quantities ■ Facilitate Purchasing Decisions activity ■ Discuss recipes ■ Facilitate Recipe Calculation activity ■ Discuss stock keeping units (SKUs) ■ Facilitate SKUs—Diced Chicken activity | <ul style="list-style-type: none"> ■ Slide Presentation ■ Participant's Workbook ■ Calculator ■ Flip Chart ■ Markers |
| Lesson 3: Inventory, Product Movement, and Cost Management | | | |
| Objective: Review basic concepts of inventory management, product movement, and cost management. | | | |
| 30 minutes | <ul style="list-style-type: none"> ■ Inventory, Product Movement, and Cost Management | <ul style="list-style-type: none"> ■ Discuss <ul style="list-style-type: none"> ○ Inventory management ○ Inventory tracking ○ Par stock ■ Facilitate Par Stock Calculation Worksheet activity ■ Discuss receiving food ■ Review and discuss the Ordering and Receiving Guide of Approved Products (Example) handout | <ul style="list-style-type: none"> ■ Slide Presentation ■ Participant's Workbook ■ Calculator |

Lessons-at-a-Glance, continued

| Time | Topic | Task | Materials |
|--|--|--|---|
| Lesson 4: Product Categories | | | |
| Objective: Summarize the types of items that are associated with a specific product category. | | | |
| 15 minutes | <ul style="list-style-type: none"> Product Categories | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Product categories Facilitate Product Categories Worksheet activity | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook |
| Lesson 5: Product Screening | | | |
| Objective: Create a sample product screening evaluation tool. | | | |
| 20 minutes | <ul style="list-style-type: none"> Product Screening | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Product screening Review and discuss the Product Screening Chart handout Facilitate Pasta Primavera Screening Evaluation Tool activity | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook Flip Chart Markers |
| Lesson 6: Product Specifications | | | |
| Objective: Practice writing a mock product specification. | | | |
| 20 minutes | <ul style="list-style-type: none"> Product Specifications | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Product specifications Review and discuss the Product Specification Summary Chart handout Facilitate Mock Bean Burrito Product Description Worksheet activity | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook |
| Lesson 7: Child Nutrition (CN) Label Products | | | |
| Objective: Examine the features of a Child Nutrition Label. | | | |
| 20 minutes | <ul style="list-style-type: none"> CN Label | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Child Nutrition (CN) Labeling Program Discuss Sample CN Label handout | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook |

Lessons-at-a-Glance, continued

| Time | Topic | Task | Materials |
|--|---|--|---|
| Lesson 8: Forecasting | | | |
| Objective: Discuss the importance of accurately forecasting products. | | | |
| 20 minutes | <ul style="list-style-type: none"> Forecasting | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Forecasting Average Daily Participation (ADP) Bid Integrity Velocity reports Facilitate Forecasting activity Discuss <ul style="list-style-type: none"> USDA Foods Past, present, and future Discuss Forecasting Questions handout Discuss Forecasting: Good Practices handout | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook Flip Chart Markers |
| Conclusion | | | |
| 20 minutes | <ul style="list-style-type: none"> Wrap up | <ul style="list-style-type: none"> Discuss <ul style="list-style-type: none"> Child Nutrition (CN) Labeling Program Discuss Sample CN Label handout Distribute and collect the post-assessment Distribute and collect the ICN evaluation | <ul style="list-style-type: none"> Slide Presentation Participant's Workbook |

Preparation Checklist

Instructions: Use the checklist to prepare for the training session.

| Task | Person Responsible | Completion Date | Completed Task |
|---|--------------------|-----------------|----------------|
| <p>Reserve equipment and gather supplies as needed for use on the day of the class (6 weeks prior).</p> <ul style="list-style-type: none"> ■ Instructor's Manual ■ Roster of participants attending for instructor ■ Participants' sign-in sheet ■ Name tags and table tents (one for each participant) ■ Calculators (one for each participant) ■ Sticky notes, index cards ■ Ground Rules ■ Agenda ■ Pre-/Post-Assessment ■ Participants' Workbooks ■ Training Evaluations ■ Certificates of Completion | | | |
| <p>List of equipment and supplies needed</p> <ul style="list-style-type: none"> ■ Microphone, preferably wireless ■ Computer to present slides ■ DVD projector and speakers ■ Projector, wireless presenter device, and slide advancer ■ Screen ■ Flip chart paper (with self-adhesive strips) or white board, if available ■ Painter's tape (Do not use masking tape.) ■ Assorted color markers (flip chart or white board) | | | |

Introduction

Instructor's Note: Greet the arriving participants, and direct them to a table that includes the participants' materials.

SHOW SLIDE: *Forecasting for the Procurement of Foods*

SAY:

Forecasting the procurement of foods is a process that includes understanding the stakeholders expectations, the menu, how to estimate quantities, review inventory, write specifications, and a number of concepts.

SHOW SLIDE: *Training*

SAY:

This training provides general concepts about the basic foundations of forecasting for the procurement of foods in Child Nutrition Programs. This training does not discuss federal regulations pertaining to the procurement system. The purpose of this training is to assist stakeholders in identifying key considerations for forecasting for the procurement of foods in federally funded meal programs.

To help guide you through this training, the Institute of Child Nutrition has provided each of you with a Participant's Workbook. The workbook contains important information and activities developed specifically for this training. On the upper right corner of the slides, you will see a reference to the corresponding lesson in the Participant's Workbook.

This training will cover a variety of topics, and questions are highly encouraged. Because all your questions are important, please write them on self-adhesive notes, and post them to the Bike Rack. Sometimes questions may require research or a longer answer than time allows at that point.

DO:

Welcome participants as they enter the room. Determine the makeup of the audience by asking for a show of hands of various positions represented at the training (e.g. school nutrition directors, cafeteria managers, other cafeteria staff, State agency, school administrators). Confirm participants have all the necessary materials for the lesson. Circulate the sign-in sheet, and request each participant sign the sheet.

Instructor's Note: Confirm participants have the necessary materials for the training. Make sure to point out the location of the restrooms and water fountain/beverages to the group.

Instructor's Note: Prior to beginning the session, place the class materials on the tables, post the Ground Rules mini posters, and create a flip chart paper labeled Bike Rack.

SHOW SLIDE: Training Overview**SAY:**

This training will discuss the following topics:

- Stakeholders
- Menus
- Inventory, Product Movement, and Cost Management
- Product Categories
- Products Screening
- Product Specifications
- Child Nutrition (CN) Label Products
- Forecasting

Each topic will include a number of sub-topics, many of which will include a number of activities to reinforce the concept.

SHOW SLIDE: *Comfort Level*

SAY:

During this training, we encourage you to determine your level of participation based on your individual needs.

SHOW SLIDE: *Pre-Assessment*

SAY:

A pre-assessment is a training tool that provides the participants' baseline knowledge of the training topic. Please select a unique identifier, and place it on the top right corner of the page. You will need to remember your identifier for the post-assessment.

(Activity): Pre-Assessment

DO:

Distribute the pre-assessment. Ask participants to place an identifier on the top right corner of the handout. State that the same identifier will be used at the conclusion of the training on the post-assessment. Remind participants it is not necessary for them to write their name on the pre-/post-assessments. Collect the assessments when the activity is completed.

SHOW SLIDE: *Icebreaker*

SAY:

We are going to do a quick icebreaker activity. Write your name and where you work on an index card. On the other side of the card, write something you would like to learn about forecasting the procurement of foods. We will collect the cards and randomly distribute them.

DO:

Collect, shuffle, and distribute one card to each participant.

(Activity): Icebreaker

SAY:

Locate the individual whose name appears on the card. Introduce yourself, and briefly discuss what you would like to learn from this training. At the end of the activity, you will introduce each other to the rest of the group, and state what each of you would like to learn from this training.

DO:

Write the participants' responses on flip chart paper. List all the topics. Once all the participants have had a chance to respond, say, "This is quite an impressive list. We will discuss these topics throughout the training."

***Instructor's Note:** Time is critical, so keep the pace fast for this activity. At the conclusion of the activity, if you have not already been introduced, provide a brief overview of your background, school nutrition interests, and your experiences in procurement. The following Icebreakers may be substituted as part of the ICN training.*

Procurement Training Icebreakers

- What do you believe is the greatest training need in understanding the procurement process?
- Give the title of the most recent procurement training you attended.
- What is the first thought that comes to your mind when you hear the word forecasting?

Source:

Institute of Child Nutrition. (2017). *Foundations for training excellence: Basics instructor's manual*. University, MS: Author.

SHOW SLIDE: *USDA Professional Standards and Learning Objectives*

SAY:

Professional Standards for school nutrition professionals is a key provision of the Healthy, Hunger-Free Kids Act of 2010 (HHFKA). The rule requires a minimum amount of annual training hours for all state directors of school nutrition programs, state directors of distributing agencies, school nutrition program directors, managers, and staff. Required training topic areas will vary according to position and job requirements. There are also minimum hiring standards for new state directors of school nutrition programs, state directors of distributing agencies that oversee USDA Foods, and school nutrition program directors. The USDA Professional Standards and Learning Objectives serve as a foundation for this training. Let's take a few minutes to review the **USDA Professional Standards and Learning Objectives** handout in the Participant's Workbook for this training.

(Workbook Handout): USDA Professional Standards and Learning Objectives

USDA Professional Standards and Learning Objectives

USDA Professional Standards

Key Area

Operations – 2000

USDA Professional Standard – Operations

2400 – Purchasing and Procurement

Learning Objectives

Using the information provided in this training, participants will:

- Review stakeholders' responsibilities and expectations.
- Discuss how the menu determines the goods and services that must be competitively procured.
- Review basic concepts of inventory management, product movement, and cost management.
- Summarize the types of items that are associated with a specific product category.
- Create a sample product screening evaluation tool.
- Practice writing a mock product specification.
- Examine the features of a Child Nutrition Label.
- Discuss the importance of accurately forecasting products.

SHOW SLIDE: *Terms and Definitions***SAY:**

Terms and definitions are included in the discussion of this training. Some of the terms and definitions listed may not be included in the training but may serve as a reference at another time. Let's take a few minutes to review the **Terms and Definitions** handout located in the Participant's Workbook.

(Workbook Handout): Terms and Definitions

Terms and Definitions

Average Daily Participation (ADP)

The Average Daily Participation (ADP) for the National School Lunch Program (NSLP) and School Breakfast Program (SBP) is the number of students that participate in the school meals program on an average day. Calculating ADP in this manner is considered to be fairer to schools as it includes only children that eat lunch/breakfast in the calculation and excludes children who are present during the school day but do not eat lunch/breakfast (i.e., part-day kindergarteners).

As Purchased (AP) and Edible Portion (EP)

The As Purchased (AP) weight is the amount purchased. The Edible Portion (EP) weight is the amount of product that can be consumed. The AP weight is greater than the EP weight. The EP is the quantity served.

Brokers

Brokers are independent sales agents who negotiate sales for manufacturers by working with food distributors and school nutrition operations. The broker assists manufacturers by introducing new products to the school nutrition market. Brokers can assist the SFA staff by providing samples for taste testing to the districts.

Child Nutrition (CN) Labeling Program

The U.S. Department of Agriculture (USDA) Child Nutrition (CN) Labeling Program provides food manufacturers the option to include a standardized food crediting statement on their product label. Labels must be authorized by the Food and Nutrition Service (FNS) prior to use, and manufacturers must have quality control procedures and inspection oversight that meet the FNS requirements. Products produced in accordance with the CN Labeling Program are generally purchased by providers for USDA meal programs. For additional information see <http://www.fns.usda.gov/cnd/cnlabeling/default.htm>.

Terms and Definitions, continued

Distributor

A distributor is a commercial food company that purchases, receives, and/or stores commercial food products. Distributors sell, deliver, and bill the recipient agency for goods and/or services provided. A distributor sells the products made by manufacturers.

First-In, First-Out (FIFO)

First-in, first-out (FIFO) is the process of rotating the older product to the front and the newer items to the back of the shelf. The age of the item is based on the manufacturer's pack date and not the date on the receipt.

Food and Nutrition Service (FNS)

The Food and Nutrition Service (FNS) administers the nutrition assistance programs of the U.S. Department of Agriculture (USDA). The mission of FNS is to provide children and needy families with better access to food and a more healthful diet through its food assistance programs and comprehensive nutrition education efforts.

Food Supply Chain

The food supply chain is a group of stakeholders who have specific responsibilities involved in the procurement process. Each stakeholder operates as an independent business, and each has specific sustainability goals. The school nutrition food chain includes the SFA staff, the distributor, the manufacturer, the State agency, and the U.S. Department of Agriculture (USDA).

Forecasting

Forecasting is the process of analyzing current and historical data to determine future trends. In the case of school nutrition programs (SNPs), forecasting involves predicting and estimating the goods, works, and services needed in specified areas for the coming year, and/or assessing needs by reviewing current procurement activities. Forecasting allows procurement plans to evolve each fiscal year.

Terms and Definitions, continued

Full and Open Competition

Full and open competition under the Child Nutrition Programs means that all qualified responsive and responsible sources are eligible to compete for the procurement.

Grade Standards

Grade standards are USDA quality standards and are based on measurable attributes that describe the value and utility of the products. U.S. Grade Standards provide a uniform language for describing the quality and condition for meat, poultry, fresh fruits, and vegetables, in addition to processed fruits and vegetables. While safety inspections are mandatory, the federal government does not require that all food products be graded.

Institute of Child Nutrition (ICN)

Formerly the National Food Service Management Institute, the Institute of Child Nutrition (ICN) is located at The University of Mississippi, Oxford campus. The mission of ICN is to provide information and services that promote the continuous improvement of child nutrition programs.

Lead Time

Lead time is the amount of time necessary for the distributor to prepare and deliver the product to the district. Generally, the more lead time that can be provided to a distributor, the more cost effective the price for the product. A longer lead time may be necessary for special order and fresh products.

Manufacturers

Manufacturers are the companies responsible for processing raw products, developing new products, and sending finished products to distributors. In some cases, customers are allowed to purchase directly from the manufacturer when volume warrants.

Terms and Definitions, continued

Material Change

A material change is a change made to a contract after the contract has been awarded that alters the terms and conditions of the contract substantially enough that, had other respondents (vendor/bidder) known of these changes in advance, they may have bid differently and more competitively.

Par Stock

Par stock is a predetermined inventory quantity for a particular item and serves as an indicator of when to reorder the product.

Procurement

Procurement is the process of obtaining goods and/or services in accordance with applicable rules and regulations.

Production Run Number

The production run number is the code that identifies the production plant, the date, the shift, and the production line that manufactured the product. This number is not printed on the label but is stamped on the case at the time the product is manufactured.

School Nutrition Association (SNA)

The School Nutrition Association (SNA) has been advancing the availability, quality, and acceptance of school nutrition programs (SNPs) as an integral part of education since 1946. The School Nutrition Association is the only professional association dedicated solely to the support and well-being of school nutrition professionals in advancing good nutrition for all children.

Terms and Definitions, continued

School Nutrition Programs (SNPs)

School nutrition programs (SNPs) are federally funded programs and include School Breakfast Program (SBP) National School Lunch Program (NSLP), After School Snack Program (ASSP), Fresh Fruit and Vegetable Program (FFVP), Special Milk Program, Seamless Summer Option (SSO), and Summer Food Service Program (SFSP).

Standardized Recipe

A standardized recipe is a recipe that has been tried, adapted, and retried several times for use by a given school nutrition operation. The tested recipe produces the same good results and yield every time when using the exact procedures the same type of equipment and the same quantity and quality of ingredients.

Standards of Identity (SOI)

Standards of Identity (SOIs) for foods are federal requirements that define what a food product is, its name, and the ingredients that must or may be used in the manufacture of that food. SOIs protect consumers by ensuring labels accurately describe the products contained within the package.

State Agency (SA)

State agency means (a) the State educational agency; (b) any other agency of the State which has been designated by the Governor or other appropriate executive or legislative authority of the State and approved by the Department to administer the Program in schools, as specified in 7 CFR 210.3(b); or (c) the FNSRO, where the FNSRO administers the Program as specified in 7 CFR 210.3(c).

Stock Keeping Unit (SKU)/Product Code

A stock keeping unit (SKU) or product code is a unique identifier for each unit of product. The SKU is usually the product code.

Terms and Definitions, continued

United States Department of Agriculture (USDA)

The USDA is the federal department responsible for administration of the nation's child nutrition and USDA Foods distribution programs. The Food Distribution Division of USDA's Food and Nutrition Service (FNS) is responsible for coordinating the distribution of USDA Foods to State agencies that oversee the SNP in their states.

USDA Foods

USDA Foods are available to any school that participates in a USDA school nutrition program. USDA Foods account for 15% to 20% of the foods in SNPs and are 100% American grown.

Velocity Report

A velocity report provides the School Food Authority (SFA) the quantity, the date of purchase, and other valuable information pertaining to the purchase of products from a vendor. The report can serve as a tool for SFA staff when forecasting the needs of the district and documenting solicitation integrity. Upon request, the distributor can generate a velocity report for products purchased during a specific time period.

Vendor

A vendor/bidder, also referred to as a respondent, is a commercial enterprise, public or nonprofit private organization, or individual that enters into a contract with a school food authority (SFA).

SHOW SLIDE: *Planning*

SAY:

Adequate planning and forecasting for the procurement of food ensures a competitive procurement process. This process is critical to the district's ability to obtain high quality products and services at the lowest possible cost. Planning and forecasting require a systematic approach to identify the products required and quantities needed before releasing a solicitation. Multiple factors contribute to the successful forecasting of the procurement of foods. For example, one factor is to understand stakeholders and their expectations.

ASK:

What are some factors that contribute to the successful forecasting for the procurement of foods?

FEEDBACK:

- Utilizing cycle menus
- Forecasting accurate quantities
- Screening the product
- Writing clear specifications
- Allowing adequate solicitation lead time
- Controlling product inventory, movement, and cost management

Instructor's Note: Place the header "Successful Forecasting" on a flip chart paper.

List the feedback bullets on the paper. Review the bullets quickly. Post the paper on the wall.

Lesson 1: Stakeholders

Objective: Review stakeholders' responsibilities and expectations.

SHOW SLIDE: *School Nutrition Supply Chain*

SAY:

The school nutrition supply chain includes the school food authority (SFA) staff, State agency, the distributor, the broker, the manufacturer, and the USDA.

SHOW SLIDE: *Stakeholders*

SAY:

Each stakeholder has a specific role in the food supply chain. The stakeholders expect each party to have some basic knowledge on the functionality of their operation. Although the expectations may widely differ, a steadfast approach in providing a healthy school environment is a common goal of all stakeholders. Let's look at the responsibilities of each stakeholder.

(Workbook Handout): Stakeholders' Responsibilities

DO:

Refer participants to the **Stakeholder Responsibilities** handout located in the Participant's Workbook, and take a few minutes to review it. Remind participants that these are only examples to show how important each stakeholder's role is to the procurement process.

Instructor's Note: *This is a quick review of the handout and should take no more than 5 minutes.*

Stakeholders' Responsibilities

| Stakeholder | Responsibilities |
|---|--|
| School Food Authority (SFA) This team may include the school nutrition director, the managers, the school nutrition staff, the business manager, a procurement officer, and the school board members. | <ul style="list-style-type: none"> Forecasting the needs of the school nutrition operation Assessing equipment needs, optimizing stock keeping units (SKUs) for similar products, determining product specifications, completing bid arrangements, and scheduling and accepting deliveries, while complying with federal and state regulations |
| State agency | <ul style="list-style-type: none"> Administering the Child Nutrition Programs Reviewing procurement procedures Reviewing and approving each contract (including supporting documentation) between an SFA and a Food Service Management Company (FSMC) Providing procurement updates and training |
| Distributor A commercial food company | <ul style="list-style-type: none"> Purchasing, receiving, and/or storing commercial food products |
| Brokers Independent sales agents who negotiate sales for manufacturers by working with food distributors and school nutrition operations | <ul style="list-style-type: none"> Assisting manufacturers by introducing new products to the school nutrition market |
| Manufacturers | <ul style="list-style-type: none"> Processing raw products, developing new products, and sending finished products to distributors |
| USDA Federal department Food and Nutrition Service (FNS) administers the nutrition assistance programs | <ul style="list-style-type: none"> Coordinating the distribution of USDA Foods to State agencies that oversee the SNP in their states Providing children and needy families with better access to food and a more healthful diet through its food assistance programs and comprehensive nutrition education |

SAY:

Let's look at the some tasks of each stakeholder. Look at how many tasks overlap.

(Workbook Handout): Stakeholders' Tasks

DO:

Refer participants to the **Stakeholder Tasks** handout located in the Participant's Workbook. Take a few minutes to review the **Stakeholder Tasks** handout. Remind participants that these are only examples to show how important each stakeholder's role is to the procurement process.

Instructor's Note: *This activity is intended to be a quick review of the handout and should take no more than 5 minutes.*

Stakeholders' Tasks

This chart provides examples of stakeholders' tasks.

| Responsibility | SFA | State Agency | Distributor | Broker | Manufacturer | USDA |
|---|-----|--------------|-------------|--------|--------------|------|
| Assure utilization of products and quantities within a 10% plus or minus variance of quantities specified; otherwise notify distributor immediately to avoid overstock or short coding. | X | | | | | |
| Communicate product recall and recall procedures in a timely manner. | | X | X | X | X | X |
| Compile orders to meet required case or dollar volumes for delivery. | X | | | | | |
| Create foods to meet school nutrition guidelines. | | | | | X | X |
| Determine if new products are applicable for customers. | X | X | | | | |
| Ensure competitive pricing. | | | | X | X | |
| Ensure delivery of fresh, safe product awarded each time an order is placed. | | | X | | | |
| Ensure facilities are adequate to receive and maintain fresh and safe foods that will help to prevent spoilage and other loss. | X | | | | | |
| Ensure full and open competition by developing a thorough solicitation document. | X | | | | | |
| Ensure staff availability to accept orders on scheduled delivery days and times. | X | | | | | |
| Establish fair and clearly defined performance expectations and complaint procedures. | X | | | | | |
| Establish reasonable delivery schedules and decrease frequency of drops whenever possible. | X | | | | | |

Stakeholder's Tasks, continued

| Responsibility | SFA | State Agency | Distributor | Broker | Manufacturer | USDA |
|---|-----|--------------|-------------|--------|--------------|------|
| Establish reasonable delivery schedules and decrease frequency of drops whenever possible. | X | | | | | |
| Follow federal rules and regulations when preparing bids and all solicitation documents. | X | | | | | |
| Follow federal rules and regulations when preparing bids. | | | X | X | X | |
| Forecast for established quantity based on past performance. | X | | | | | |
| Generate pre-bid meetings, solicitation document, and contracts for vendors. | X | | | | | |
| Generate specific product descriptions, including green criteria as appropriate. | X | | | | | |
| Identify approved USDA Foods processors. | | | | | | X |
| Integrate USDA Foods into processed products as specified by the State agency or school district. | | | | | X | |
| Keep distributor, broker, and SFA staff abreast of new products. | | | | | X | |
| Keep procurement rules and policy memos up to date. | X | | | | | |
| Market new products. | | X | | X | | |
| Minimize emergency orders. | X | | | | | |

Stakeholder's Tasks, continued

| Responsibility | SFA | State Agency | Distributor | Broker | Manufacturer | USDA |
|--|-----|--------------|-------------|--------|--------------|------|
| Negotiate, when appropriate, for longer contract terms (two or more years) that include price adjustment clauses. | X | | | | | |
| Notify manufacturers of upcoming solicitation proposals, the product description, and specific requirements such as lead time. | | | X | | | |
| Notify the distributor or SFA staff of product changes such as formulation, packaging, or discontinuation. | | | | X | | |
| Notify the SFA staff and brokers of product changes such as formulation, packaging, or if product is discontinued. | | | | | X | |
| Optimize the use of SKUs. | X | | | | | |
| Place orders in a timely manner. | X | | X | | | |
| Plan ahead to adequately prepare solicitation document. | X | | | | | |
| Plan menus in advance and incorporate USDA Foods. | X | | | | | |
| Produce adequate quantity to eliminate/reduce shortages. | | | | | X | |
| Provide adequate notification on product usage and menu changes. | X | | | | | |
| Provide advanced written notification to the supplier before the placement of the first order to ensure timely distribution. | X | | | | | |

Stakeholder's Tasks, continued

| Responsibility | SFA | State Agency | Distributor | Broker | Manufacturer | USDA |
|---|-----|--------------|-------------|--------|--------------|------|
| Provide current contact information for bid notifications. | | | X | X | X | |
| Provide flexible delivery schedules to accommodate school closings and inclement weather conditions. | | | X | | | |
| Provide notification if there is an excess of inventory, especially on date-coded products. | | | X | | | |
| Provide notification of discontinued products, current inventory quantity, and velocity reports. | | | X | | | |
| Provide notification of expected school closings, holidays, and changes in normal business hours. | X | | | | | |
| Provide nutrient and ingredient information. | | | | X | | |
| Provide quality, safe food. | | | | | X | X |
| Provide recipes that optimize SKUs. | | | X | X | | X |
| Provide timeline for ordering process. | | | | | | X |
| Provide up-to-date meal component information for CN labeling. | | | | | X | X |
| Provide up-to-date nutrient and ingredient information and marketing suggestions for Point of Sale (POS). | | | | | X | |
| Purchase all special order products requested. | X | | | | | |
| Use projected quantity in a reasonable time period. | X | | | | | |

SHOW SLIDE: *Lead Time***SAY:**

Receiving a product by a designated date, especially a new product, involves a vast amount of coordination from the different stakeholders. Lead time is the amount of time necessary for the distributor to prepare and deliver the product to the district. School districts, State agencies, distributors, and manufacturers may have different timelines for procuring a product, but the overall process is very similar. A longer lead time may be necessary for special order and fresh products. The following must be taken into consideration when determining the delivery date:

- The complexity of the solicitation requirements
- The time needed for pre-solicitation/award meetings, site visits, etc.
- State and district due date requirements to authorize purchases

SHOW SLIDE: *Receiving a Product***SAY:**

Advanced, detailed planning for receiving products is a good practice and contributes to

- a more cost effective price for the product,
- fewer menu shortages,
- fewer purchasing and delivery errors, and
- fewer problems to manage.

(Workbook Handout): Lead Time**DO:**

Ask the participants to review the **Lead Time** handout located in the Participant's Workbook.

Lead Time

Lead time is the amount of time necessary for the distributor to prepare and deliver the product to the district. Due to the vast amount of responsibilities of all the stakeholders, providing all stakeholders with ample lead time is critical.

Advertise the Solicitation

The solicitation must be advertised sufficiently in advance of the due date to permit potential respondents (vendors/bidders) the opportunity to obtain the solicitation document and prepare a response. Check with your State agency and become familiar with additional state rules and policies.

Pre-Bid Conference

Although not a federal requirement, it is a good practice to invite potential vendors to attend a pre-solicitation conference. The conference may be scheduled after the solicitation has been published but a minimum of 2 weeks before the solicitation opening to allow adequate time to prepare the proposal. It is unrealistic to ask vendors to submit a response to the solicitation document with less than a 6-week return time, and, ideally, 8–12 weeks of lead time is preferred.

Detailed Procuring Timeline

Since different products or service categories (e.g., milk and milk products, fresh produce, large equipment, accountant services, etc.) require differing amounts of preparation and lead time, a good practice is to develop a detailed procuring timeline for each category.

Solicitation Award

It is also important to allow adequate lead time between the solicitation award and the first delivery. Once a contract has been properly procured, the next step is to contact the appropriate party in the food supply chain, the distributor, and place an order.

Lead Time, continued

Product Code

If a new product code number needs to be developed, this item is a new item. The first step for the distributor is to check to see if it is from a company with whom they currently do business. If not, they must establish credit with this company, determine minimum order quantities, determine delivery frequency, and any other issue unique to this manufacturer.

Coordination of Efforts

Remember, stakeholders will need to coordinate the increased volume and delivery logistics of purchases. The coordination process may require an additional 6 weeks. Base the delivery schedule on the mutual agreement and consolidated order between all concerned. Establishing these factors takes time, which is why adequate lead time is vital.

Distribution Routes

The distributor develops routes and schedules and coordinates for trucks and personnel to be available to deliver the products. To initiate the supply side of the contract, the distributor must determine if the item is already in stock and part of their inventory. If not, a product code number must be developed and accepted into their inventory and ordering system.

ASK:

What factors contribute to a stakeholder's ability to provide a product on a designated delivery date?

FEEDBACK:

- Planning the menu in advance
- Coordinating delivery dates with the school calendar

(Activity): Receiving Product**DO:**

Ask participants to write on self-adhesive notes factors that contribute to a stakeholder's ability to provide a product on a designated delivery date. Ask the participants to post their responses on the appropriate flip chart paper. At the end of the activity, review the participants' responses.

Instructor's Note: *The purpose of this activity is to illustrate how important it is to allow sufficient time to all stakeholders involved in the receiving of a product on a designated date. Before the activity, post six flip chart papers on the wall with one of the following headers:*

- Lead Time—School District
- Lead Time—State Agency
- Lead Time—Distributor
- Lead Time—Broker
- Lead Time—Manufacturers
- Lead Time—USDA

Scatter the flip chart papers on the walls of the training room, to encourage the participants circulate around the room.

(Workbook Handout): Procuring Timeline Example**DO:**

Refer participants to the **Procuring Timeline Example** handout located in the Participant's Workbook. Ask participants to review the handout and discuss when they would complete the tasks noted on the timeline. Remind participants that the handout serves as a model of a procurement timeline, and district's needs may differ.

***Instructor's Note:** The purpose of this activity is to reinforce the importance of planning for the procurement process. Districts needs may vary and the monthly tasks may differ.*

Procuring Timeline Example

Receiving a product, especially a new product, can impact the entire food supply chain. School districts, distributors, and manufacturers may have different timelines for procuring a product, but the overall process is very similar.

| Month | Task(s) | Date Completed |
|------------------|---|----------------|
| December–January | <ul style="list-style-type: none"> ■ Begin cycle menu planning and estimating quantities for purchases. | |
| February | <ul style="list-style-type: none"> ■ Write specifications for new products. ■ Estimate quantities to be purchased for the contract period and menu cycle. ■ Project USDA Foods needs during the contract period. ■ Reduce quantities based on the availability of USDA Foods. ■ Conduct screen and product tests for approved brands. <p>Remember school closing for holidays impacts timeline.</p> | |
| March–April | <ul style="list-style-type: none"> ■ Develop and publish the solicitation document. Include <ul style="list-style-type: none"> ○ pertinent information about the district; ○ date and time for pre-solicitation conference and solicitation submission; ○ scope of work; ○ time period for the solicitation; ○ any common legalities; ○ ability for price adjustment; ○ name brand items; ○ method of approving new brands, substitutions; ○ discounts, rebates, and applicable credits; ○ communication instructions with the district prior to the closing date; and ○ solicitation evaluation criteria for contract award to the lowest responsive and responsible bidder/offer that is most advantageous to the program with price as the primary factor. ■ Publish on website(s), and/or in public media for maximum competition. ■ Conduct the solicitation meeting. ■ Allow a minimum of four weeks for vendors to respond. ■ Evaluate solicitations based on pre-established criteria and select vendor. | |

Procuring Timeline Example, continued

| Month | Task(s) | Date Completed |
|----------------|---|----------------|
| May | <ul style="list-style-type: none"> Plan accordingly to receive bids/responses, conduct evaluations for contract award, and notify responding bidders/offers of intent to award, if applicable. Provide solicitation, evaluation and award information to all approval authorities following internal procedures. Provide sufficient time to modify proposal accordingly based on protests and/or legal counsel's directives. | |
| June | <ul style="list-style-type: none"> Receive School Board approval for the selection of vendor. Provide information to distributor and/or manufacturer. Allow longer time for specialty items and name brand items. Communicate with stakeholders, determine delivery dates, and discuss school opening logistics. <p>Remember school closing for summer impacts timeline.</p> | |
| July–September | <ul style="list-style-type: none"> Receive School Board approval for the selection of vendor. Provide information to distributor and/or manufacturer. Allow longer time for specialty items and name brand items. Communicate with stakeholders, determine delivery dates, and discuss school opening logistics. Receive product for upcoming school year depending on school opening schedule. <p>Remember school closing for summer impacts timeline.</p> | |

Note: The solicitation document is the vehicle by which the SFA staff articulates to the public its need for goods and/or services. For additional information, refer to the Solicitations section located in the ICN *Procurement in the 21st Century* resource.

Lesson 2: Menus

Objective: Discuss how the menu determines the goods and services that must be competitively procured.

SHOW SLIDE: *Menu*

SAY:

The menu is the driving force that begins the procurement process. The menu must meet all federal guidelines and be appealing to the customer. A well-planned menu includes:

- all meal pattern components and subgroups;
- whole grain-rich foods;
- fruits and vegetables;
- a variety of shapes, textures, colors, and temperatures; and
- a blend of flavors.

Other factors to consider in menu planning include equipment, food cost, cultural food preferences, labor costs, skill levels, environmental friendliness, and the availability of USDA Foods.

ASK:

How many of you use cycle menus?

DO:

Ask whether cycle menus are used for breakfast, lunch, snacks, or all menus. Also, ask whether the cycle menus are for elementary, middle, or high school levels.

ASK:

How far in advance do you plan your menus? What are the benefits of planning menus well in advance?

FEEDBACK:

A good practice is to plan your menus 1 year in advance. Planning menus in advance

- helps to determine accurate quantities for forecasting,
- saves time,
- helps avoid repetitive tasks,
- reduces labor, and
- helps implement a cost effective inventory management process.

SAY:

It is good practice for districts to use a cycle menu for a designated period of time. Menus created by seasons allow the opportunity to incorporate in-season options. Planning menus in advance saves time, helps avoid repetitive tasks, reduces labor, and implements cost effective inventory management. Standardized recipes and SKUs are important considerations when planning menus.

SHOW SLIDE: *New Items***SAY:**

Adding items to a contract may commonly occur among schools; however, adding products that have not been competitively procured fails to comply with procurement standards. A new product to a manufacturer but not new to the industry does not constitute a new item. New products developed after the award of the contract may be added to the contract only if there is a provision included that allows for the addition of items up to a dollar value or volume that does not constitute a material change.

What happens when the contract fails to contain a provision for the addition of items? The best approach is to conduct a competitive process using the applicable procurement method. This includes using the micro-purchase method when the purchase is below \$10,000; small purchase procedures for

purchases between \$10,000–\$250,000, or the most restrictive threshold; and sealed bids or competitive proposals when the purchase is above \$250,000 or the most restrictive threshold. Here is an example of possible language for the addition of a new menu item.

New Items

The following information is intended only as an example.

To: (name of location and address of purchasing agency)

Attn: Purchasing Official

Due date/time:

Purchasing official(s) will review the products(s) and materials for consideration during the next solicitation phase. Upon completion of sampling, the purchasing official(s) reserve the right to approve or reject any or all samples submitted in the best interest of the (district/school) and all decisions shall be final.

SHOW SLIDE: *Material Change*

SAY:

A material change is a change made to a contract after the contract has been awarded that alters the terms and conditions of the contract substantially enough that, had other respondents (vendor/bidder) known of these changes in advance, they may have bid differently and more competitively.

This means the SFA agrees to or allows a winning respondent to make changes to contract terms (including the terms of a contract renewal) that are materially inconsistent with the underlying solicitation document. SFAs must not circumvent Federal procurement standards to maximize full and open competition by denying all respondents the opportunity to compete under the same terms and conditions. In this situation the SFA must re-bid the contract.

SHOW SLIDE: *Using Common Denominator Units When Listing Products*

SAY:

Food is often more difficult to purchase than other items school districts may buy. Inconsistent packaging sizes add a different dimension to developing solicitations for food supplies. A size unit is a common denominator for all brands. In some cases, there may be two common denominators for the same product.

Here are some examples of common denominator units used for procuring food:

- Cases
- Count
- Pounds
- Edible serving size
- A request for a CN Label 2 oz Meat/Meat alternate product or Product Formulation Sheet

SHOW SLIDE: *Food Buying Guide*

SAY:

The *Food Buying Guide Calculator for Child Nutrition Programs* is a very useful tool to assist with determining the amount of food to purchase. Remember, the *Food Buying Guide* only provides an estimate of the amount of food to purchase. The *Food Buying Guide* calculator can be accessed via the following link: <http://fbg.theicn.org>.

SHOW SLIDE: *As Purchased (AP) and Edible Portion (EP)***SAY:**

Many factors contribute to calculating the amount of food needed to purchase to equal the amount of food needed for a recipe or service. *As Purchased (AP)* and *Edible Portion (EP)* are key concepts to understand in inventory management.

- AP refers to the weight of the product as it exists when purchased.
- EP refers to the part of the product that can be consumed. The AP weight is greater than the EP weight.

SHOW SLIDE: *Unit of Measurement and Cost per Serving***SAY:**

To compare prices, a unit of measure should be chosen that controls the cost per serving. Give careful consideration to the unit of measurement in awarding an item. Asking for a pound price on a product usually makes good sense, but sometimes may be misleading. For example, sliced mozzarella cheese is sold by the pound per case. Using a pound as the common denominator unit of measurement will allow an easy calculation of determining the actual number of servings per pound. On the other hand, if the specification is for individually wrapped, mozzarella cheese sticks with a serving size of 3/4 oz each, the case may have 128–3/4 oz units per case. Each product and pack size is essential when providing product information to vendors.

Asking for per pound pricing on chicken tenders might not yield comparable results. It is important to identify the product's meal pattern contribution. For example, Company A and Company B offer the exact same price for a 25 lb. case of comparable chicken tenders. A serving of chicken tenders from Company A weighs 4 oz per portion. A serving of chicken tenders from Company B weighs 3 oz portion. In this example, the price per pound is exactly the same, yet you would need more pounds of Company A's product to serve the same number of students. The unit of measurement for the pricing in this example would be price per edible serving. So in this example, asking for servings may be more appropriate for the chicken tenders.

SHOW SLIDE: *Updating Quantities*

SAY:

Before creating a solicitation document, it is important to make sure that all language and product information is accurate and up-to-date. A critical aspect of any solicitation document is updated and accurate quantities. These quantities are established in your forecasts; and although they cannot be guaranteed, these quantities should be estimates based on valid and current information.

(Workbook Activity): Purchasing Decisions

DO:

Review the instructions for the **Purchasing Decisions** worksheet. Divide participants into small groups. At the conclusion of the activity, refer participants to the **Purchasing Decisions Answer Key** located in the Participant's Workbook appendix.

Purchasing Decisions

Answer Key

Instructions: Complete the steps to calculate the cost of a product.

Scenario: Purchasing Decision: Broccoli

For an upcoming menu, the manager is determining whether to order untrimmed fresh broccoli or trimmed fresh broccoli florets. Both products are acceptable.

Broccoli, fresh, untrimmed

- 100–½ cup EP servings will require 19.75 lb. of AP product
- Cost per pound is \$1.29 lb.
- Requires 60 minutes of labor before portioning into ½ cup serving size
- Labor cost \$11.70/60 minutes

Cost of Broccoli, Fresh, Untrimmed

| | | | | |
|--------------------------------------|---|----------------|---|---|
| Amount of Broccoli to Purchase | x | Cost per Pound | = | Purchase Cost of Broccoli, fresh, untrimmed |
| 19.75 lb. | x | \$1.29 per lb. | = | \$25.48 Purchase Cost |

Cost of Broccoli, Fresh, Untrimmed with Labor

| | | | | |
|---|---|---------------------------|---|--|
| Purchase Cost of Broccoli, fresh, untrimmed | + | Labor Cost | = | Total Cost of Broccoli, fresh, untrimmed |
| \$25.48 Purchase Cost | + | \$11.70 per 60 Minutes | = | \$37.18 Total Cost |

Purchasing Decisions Worksheet Answer Key, continued

Broccoli, fresh, florets, trimmed, ready-to-use

- 100–½ cup EP servings will require 7 lb. of AP product
- Cost per pound is \$2.08 lb.
- Requires 15 minutes of labor before portioning into ½ cup serving size.
- Labor cost \$11.70/60 minutes or \$2.93/15 minutes

Cost of Broccoli, Fresh, Florets, Trimmed, Ready-to-Use

| | | | | |
|--------------------------------------|---|----------------|---|--|
| Amount of Broccoli to Purchase | x | Cost per Pound | = | Purchase Cost of Broccoli, fresh, florets, trimmed |
| 7 lb. | x | \$2.08 per lb. | = | \$14.56 Purchase Cost |

Cost of Broccoli, Fresh, Florets, Trimmed with Labor

| | | | | |
|---|---|--------------------------|---|---|
| Purchase Cost of Broccoli, fresh, trimmed | + | Labor Cost | = | Total Cost of Broccoli, fresh, florets, trimmed |
| \$14.56 Cost | + | \$2.93 per 15 Minutes | = | \$17.49 Total Cost |

Which product is less expensive?

Answer:

Broccoli, fresh, florets, trimmed, ready-to-use

What are the factors to consider before deciding to purchase one product over the other?

Example responses

- Labor cost
- Storage space

SHOW SLIDE: Recipes

SAY:

Standardized recipes are required in school nutrition programs and identify the specific quantity for each ingredient, the number of servings, and the portion size for the recipe. A standardized recipe is a recipe that has been tried, adapted, and retried several times for use by a given school nutrition operation. The tested recipe produces the same good results and yield every time when using the exact procedures, the same type of equipment, and the same quantity and quality of ingredients.

Information provided in the recipe determines the type and quantity of food to purchase. For example, if a recipe contains chopped, fresh, onions the quantity to purchase or the As Purchased amount can differ tremendously from the Edible Portion amount.

In the next activity, we will calculate the as purchased quantity to obtain the desired edible portion. We will use the **USDA Foods Product Information Sheet** and **Recipe Calculation Worksheet** in the Participant's Workbook.

DO:

Review the *As Purchased (AP)* and *Edible Portion (EP)* definitions. Facilitate the activity, and provide the correct answers at the conclusion of the activity.

Instructor's Note: The ***USDA Foods Product Information Sheets*** are located at

<https://www.fns.usda.gov/fdd/nsfp-usda-foods-fact-sheets>

(Workbook Handout): USDA Foods Product Information Sheets

(Workbook Activity): Recipe Calculation

UNITED STATES DEPARTMENT OF AGRICULTURE
USDA Foods Product Information Sheet
 For Child Nutrition Programs

100101—Chicken, Diced, Cooked, Frozen

Category: **Meat/Meat Alternate**



PRODUCT DESCRIPTION

- This item is fully cooked, diced chicken meat. This product is diced into approximately ½-inch cubes and is a natural proportion product that contains a minimum of 50% white meat. This item is shipped frozen in 40 pound cases containing eight 5-pound or four 10-pound packages.

CULINARY TIPS AND RECIPES

- Diced chicken is a versatile ingredient that can be used in a variety of different dishes such as burritos, chicken salad, wraps, soups, casseroles, or as a topping on the salad bar.
- For more culinary techniques and recipe ideas, visit the ICN Child Nutrition Recipe Box: <https://theicn.org/cnrb/>.

FOOD SAFETY INFORMATION

- For more information on safe storage and cooking temperatures and safe handling practices, please refer to ICN's Food Safety page at: <https://theicn.org/foodsafety>.

NUTRITION FACTS

Serving size: 1 ounce (28 g)/1 MMA diced chicken

Amount Per Serving

Calories 36

Total Fat 1g

Saturated Fat 0g

Trans Fat 0g

Cholesterol 21mg

Sodium 28g

Total Carbohydrate 0g

Dietary Fiber 0g

Sugars 0g

Protein 6g

Source: USDA Foods Vendor Labels

Allergen Information: Please refer to allergen statement on the outside of the product package for vendor specific information. For more information, please contact the product manufacturer.

Nutrient values in this section are from the USDA National Nutrient Database for Standard Reference or are representative values from USDA Foods vendor labels. Please refer to the product's Nutrition Facts label or ingredient list for product-specific information.

This page is adapted from www.fns.usda.gov/fdd May 2015

Recipe Calculation

Answer Key

Instructions: Using the **USDA Foods Product Information Sheet**, answer the following questions.

Calculate: One 40-lb. case of Diced Chicken provides approximately 640–1-oz portions.

How many 2.5-oz servings are in one 40-lb case of USDA Foods Diced Chicken?

ANSWER: 256–2.5 oz servings are in one 40-lb case of USDA Diced Chicken

($640 \text{ oz} \div 2.5 \text{ oz} = 256\text{--}2.5\text{-oz servings}$)

Calculate: How many pounds of USDA Foods Diced Chicken are needed for 100–2.5-oz servings?

ANSWER: 15.625 lb of USDA Foods Diced Chicken will provide 100–2.5 oz servings

($2.5 \text{ oz} \times 100 = 250 \text{ oz}$)

($250 \text{ oz} \div 16 \text{ oz or } 1 \text{ lb} = 15.625 \text{ lb}$)

SHOW SLIDE: *Stock Keeping Units (SKUs)/ Product Codes*

SAY:

Good menu planning also includes optimizing stock keeping units (SKUs). A SKU is a unique identifier for each unit of product and is often the product code. Identifying multiple uses for an inventory item is cost efficient for both the district and the vendor. Think of all the menu items you can create with diced chicken, brown rice, or chopped fresh onions.

In many cases, school districts burden themselves with too many different products or SKUs. For instance, each flavor of juice has a separate SKU with its own product code number.

ASK:

What are some benefits of reducing SKUs or the number of products that are in your inventory?

FEEDBACK:

- Utilizes storage space efficiently
- Reduces labor cost (ordering food, conducting inventory)
- Increases opportunity for a lower price (increase volume of the item)

SHOW SLIDE: *Reducing SKUs*

SAY:

Reducing the number of SKUs is a best practice. A few ways to reduce SKUs include

- using the same product for more than one menu item, such as one type of chicken patty for chicken on a bun, chicken parmesan, and grilled chicken salad; and
- accepting only substitutions that have been approved by the school nutrition director or central office person responsible for purchasing.

(Activity): SKUs—Diced Chicken**DO:**

Divide participants into small groups. Provide a flip chart paper to each group. Ask each group to determine a variety of menu items that could contain the USDA Foods Diced Chicken. Ask the groups to write their responses on the flip chart paper. At the end of the activity, ask participants to circulate around the room and see all the different ways to incorporate diced chicken on a menu.

Instructor's Note: As the groups are reporting, write the responses on a flip chart paper and tally the similar responses. Also, remind participants that although several items may appear similar, the recipes may be quite different. Encourage participants to discuss their recipes during a break.

Lesson 3: Inventory, Product Movement, and Cost Management

Objective: Review basic concepts of inventory management, product movement, and cost management.

SHOW SLIDE: *Inventory Management*

SAY:

Often, inventory ties up a large portion of the SFAs budget, so managing this system efficiently is crucial for any school nutrition program. Erratic orders can add to the overall food and labor costs. The balance between inventory and receiving food lies in the ability to control cost while adequately meeting the needs of the organization.

SHOW SLIDE: *Inventory*

ASK:

What are some ways you manage inventory in your district?

FEEDBACK:

Answers may include the following responses:

- Allowing adequate lead time for orders
- Providing good communication to vendors
- Conducting weekly physical inventory
- Managing par stock levels
- Locking storerooms

SAY:

A prime part of inventory management includes knowing the value of food and supplies on hand, whether at a food preparation site or in a central warehouse facility. Effective inventory management is essential for managing and controlling cost. Effective inventory management includes effective receiving procedures, a system for accounting for items removed from inventory, effective counting of items in stock, and determining appropriate methods for calculating the financial value of the inventory. It is important to manage food orders properly to minimize waste while also keeping storage capacity in mind. Inventory is perishable and space is limited, making proper product management even more crucial.

Many SFAs use a perpetual inventory and/or a physical inventory system to account for products. Regardless of the system used, a periodic physical inventory is a best practice to account for the value of goods received and available.

ASK:

How many of you use a perpetual inventory system? How many use a physical inventory system? How many use both?

FEEDBACK:

Anticipated feedback is that few will use a perpetual inventory system, most will do a physical inventory only on either a monthly basis or annual basis, and fewer will maintain both.

SHOW SLIDE: *Inventory Tracking*

SAY:

For the busy school nutrition director to know what is on hand requires the district to have and use an up-to-date inventory tracking system. Clearly, having automated systems in place to assist in forecasting the district's needs will make this task much easier. Advantages include reduced inventory, reduced costs, and reduced paperwork.

SHOW SLIDE: *Par Stock***SAY:**

Ensuring the SFA staff is ordering the correct amount is more important than maintaining a stable number of cases ordered. A good way to facilitate this is to include an accurate par stock on the order sheet. Par stock is a predetermined inventory quantity for a particular item and serves as an indicator on when to reorder the product. Establish a par stock through thorough evaluation of product use over the amount of time between deliveries. For example, if you have weekly deliveries and know you use three cases of fresh, sliced onions a week, you would always want three cases of onions in inventory. The quantity to keep on hand is reflected in the par stock number.

In the next activity, we are going to practice calculating the par stock quantity for diced chicken. We will do the activity in two parts. For the first part of the activity, we will divide into small groups. We will complete the second part as one large group.

(Activity): Par Stock Calculations Worksheet**DO:**

Divide participants into a minimum of six small groups. Refer participants to the **Par Stock Calculations Worksheet** located in the Participant's Workbook. Assign one school to each of the groups.

Part 1

Ask the groups to calculate the total amount of diced chicken their school will need based on the number of servings for the menu items. Remind participants that they will need to convert ounces into pounds. Ask each group to report the total amount of diced chicken items needed for their assigned school.

Part 2

Ask each group to report the total amount of diced chicken they will need to meet the menu demands for their school. As a group, complete the District's Warehouse section of the worksheet. Determine the par stock quantity the district warehouse should maintain in inventory. At the end of the activity, refer participants to the **Par Stock Calculations Worksheet Answer Key** located in the Participant's Workbook appendix.

Par Stock Calculations Worksheet

Answer Key

Scenario: A school district has four elementary schools, one middle school, and one high school. Diced chicken is used in several menu items throughout the month. The par stock level to maintain in the district's warehouse for cooked, diced chicken is 600 lb. over the amount needed for the menu. How many pounds of diced chicken will the warehouse need in inventory to meet the par stock level? Remember, you will need to convert the number of ounces into pounds to complete the activity. Round answers to the nearest whole number.

School Name: Fresh Apple Elementary

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb)* |
|---|----------------------------|--|---|
| Chicken Tacos | 1 oz | 112 | 112 oz/7 lb |
| Chicken Caesar Salad | 1 oz | 89 | 89 oz/6 lb |
| Chicken Tuscan Chili | 1.5 oz | 138 | 207 oz/13 lb |
| Chicken Alfredo Baked Potato | 1 oz | 143 | 143 oz/9 lb |
| Total amount of diced chicken for menu items | | | 551 oz/35 lb |

School Name: Strawberries Elementary

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb)* |
|---|----------------------------|--|---|
| Chicken Tacos | 1 oz | 111 | 111 oz/7 lb |
| Chicken Caesar Salad | 1 oz | 95 | 95 oz/6 lb |
| Chicken Tuscan Chili | 1.5 oz | 101 | 152 oz/10 lb |
| Chicken Alfredo Baked Potato | 1 oz | 157 | 157 oz/10 lb |
| Total amount of diced chicken for menu items | | | 515 oz/33 lb |

Par Stock Calculations Worksheet, continued

Answer Key

School Name: Peaches Elementary

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb)* |
|--|----------------------------|--|---|
| Chicken Tacos | 1 oz | 270 | 270 oz/17 lb |
| Chicken Caesar Salad | 1 oz | 125 | 125 oz/8 lb |
| Chicken Tuscan Chili | 1.5 oz | 115 | 173 oz/11 lb |
| Chicken Alfredo Baked Potato | 1 oz | 274 | 274 oz/18 lb |
| Total amount of diced chicken (lb) for menu items | | | 842 oz/54 lb |

School Name: Grapes Elementary

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb) |
|---|----------------------------|--|--|
| Chicken Tacos | 1 oz | 149 | 149 oz/10 lb |
| Chicken Caesar Salad | 1 oz | 93 | 93 oz/6 lb |
| Chicken Tuscan Chili | 1.5 oz | 287 | 431 oz/27 lb |
| Chicken Alfredo Baked Potato | 1 oz | 297 | 297 oz/19 lb |
| Total amount of diced chicken (lb)for menu items | | | 970 oz/62 lb |

Par Stock Calculations Worksheet, continued

Answer Key

School Name: Garbanzo Bean Middle School

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb) |
|---|----------------------------|--|--|
| Chicken Tacos | 2.0 oz | 368 | 736 oz/46 lb |
| Chicken Caesar Salad | 2.0 oz | 215 | 430 oz/27 lb |
| Chicken Tuscan Chili | 2.0 oz | 198 | 396 oz/25 lb |
| Chicken Alfredo Baked Potato | 2.0 oz | 320 | 640 oz/40 lb |
| Total amount of diced chicken (lb)for menu items | | | 2,202 oz/138 lb |

School Name: Edamame High School

| Menu item | Diced chicken serving size | Number of average servings listed on past production records | Amount of diced chicken needed for menu item(lb) |
|---|----------------------------|--|--|
| Chicken Fajitas | 2.5 oz | 548 | 1,370 oz/86 lb |
| Chicken Caesar Salad | 2.0 oz | 510 | 1,020 oz/64 lb |
| Chicken Tuscan Chili | 2.5 oz | 446 | 1,115 oz/70lb |
| Chicken Alfredo Baked Potato | 2.0 oz | 368 | 736 oz/46 lb |
| Total amount of diced chicken (lb)for menu items | | | 4,241 oz/266 lb |

Par Stock Calculations Worksheet, continued

Answer Key

District's Warehouse

| School | Amount of diced chicken needed for menu item(lb) |
|-----------------------------|--|
| Fresh Apple Elementary | 35 lb |
| Strawberries Elementary | 33 lb |
| Peaches Elementary | 54 lb |
| Grapes Elementary | 62 lb |
| Garbanzo Bean Middle School | 138 lb |
| Edamame High School | 265 lb |
| Total | 587 lb |

How many cases of diced chicken does the district need to maintain in the district's warehouse for a par stock level of 600 lb. over the amount needed for the menus?

$587 \div 40 \text{ lb. case} = 15$ (14.65 cases) of diced chicken

$15 \text{ cases} + 15 \text{ cases} = 30 \text{ cases}$

*Remember to determine the number of pounds when calculating the amount of diced chicken needed for the menu item. Round up to the nearest whole number.

SHOW SLIDE: *Receiving Food***SAY:**

Receiving is an important part of inventory management and quality and cost control. The entire receiving process requires consistent control. Part of the consistent control is ensuring food products received are the actual food products ordered. Some receiving tips include the following best practices:

- Provide a copy of the order to the person receiving the delivery.
- Check the products delivered against the products ordered. Do not accept unapproved product substitutions.
- Use a two-wheel truck, forklift, and/or carts to move products from the receiving dock.
- Follow the hazard analysis and critical control points (HACCP)-based food safety plan.
- Keep a clipboard or other flat surface available to assist in the receiving process.
- Communicate product shortages and quality concerns to the delivery person and the appropriate SFA staff member.

Each school district has a system for communicating the brand and code numbers of products preapproved during the contract award. This information is key for monitoring contractor performance, a requirement of 2 CFR 200.318(b). When school districts do not provide brands and code numbers on their resulting contract, the site receiver must check the products against the specifications. The most effective approach to improving the ordering and receiving process is to award the brand and code number in the resulting contract.

One method of ensuring products solicited and awarded are the products ordered and received is to provide the staff with an Ordering and Receiving Guide of Approved Products.

Staff with responsibilities of ordering and receiving products can use the guide to ensure

- the correct products are ordered, and
- the correct product, brand, code, and pack is received at the right price.

(Workbook Handout): Ordering and Receiving Guide of Approved Products (Example)

DO:

Refer participants to the **Ordering and Receiving Guide of Approved Products (Example)** handout located in the Participant's Workbook. Discuss each characteristic identified on the chart.

Ordering and Receiving Guide of Approved Products (Example)

Instructions: Individuals receiving food should compare the Product, Brand/Code, Pack, and Price of what is ordered to what is actually received. It is important to visually inspect the product, review the invoice, and confirm the product ordered is the actual product received.

| Product Ordered | Brand/Code | Pack | Price |
|---------------------|-----------------------|------------------|------------------------------|
| Frozen Meats | | | |
| Beef, ground | Beef Ranch/3579 | 4/5# | \$57.50/cs \$2.875/lb |
| Beef, patties | Beef Ranch/4680 | 128/3 oz | \$69.00/cs \$.539/serving |
| Chicken nuggets | Chicken Farm/14679 | 300/5 oz 6 =2 oz | \$37.95/cs \$.759/serving |

For additional information see the Inventory Management and Reference Tracking Guide, which can be accessed at: www.theicn.org/ResourceOverview.aspx?ID=431.

Lesson 4: Product Categories

Objective: Summarize the types of items that are associated with a specific product category.

SHOW SLIDE: *Product Categories*

SAY:

Varieties of brands exist for similar products. The menu and standardized recipe will help determine the type of product to purchase. Product categories include Distributor's Choice Label, Private Label, and Manufacturer's Brand Label. It is worthwhile to investigate all categories before making any decisions.

(Workbook Activity): Product Categories Worksheet

DO:

Refer participants to the **Product Categories Worksheet** located in the Participant's Workbook. Discuss the categories and the description for each category.

Instructor's Note: *This activity is a quick review of the handout and should take no more than 5 minutes.*

Product Categories Worksheet Answer Key

Instructions: Identify the types of products you would purchase for each of the product categories. The menu and standardized recipe will help determine the type of product to purchase. It is worthwhile to investigate all categories before making any decisions.

The Buy American provision applies to agricultural commodities produced in the United States and a food product that is processed in the United States when purchased for serving in the school meals program.

Schools must purchase domestic commodities and products, to the maximum extent practicable (2 CFR 210.21(d)). If the product has passed the label and nutritional screening, proceed to the appearance screening.

It is important to ensure products, regardless of the category, comply with the Buy American provision and to accurately forecast (estimate) the goods and/or services needed in specified areas for the coming year. Ensure all procurement procedures, solicitations, and contracts incorporate the updated Buy American requirements.

Schools should plan and adjust their procurement practices to meet the phased-in non-domestic food cost caps:

1. School Year 2025–2026: 10%
2. School Year 2028–2029: 8%
3. School Year 2031–2032: 5%

These caps apply to the total commercial food costs purchased, aiming to assist schools in gradually adapting to the new requirements.

Product Categories Worksheet Answer Key, continued

| Product Category | Description | Examples |
|----------------------|---|--|
| Distributor's Choice | <ul style="list-style-type: none"> ■ Does this product comply with the Buy American provision? Is it "domestic only" or 100% produced and processed in the United States substantially using agricultural commodities produced in the United States, meaning that over 51 percent of a food product must consist of agricultural commodities grown domestically? ■ Contains only one or a few ingredients ■ Represents a lower dollar volume ■ Quote a price on any brand ■ No restrictions on the brands to be purchased ■ Site receiver does not check the brand delivered ■ May change the brand without notifying the school district <p>Note: The only requirement is that the product is in the pack and the case size is identified on the solicitation document. A case of pinto beans containing 12/#303 cans cannot be substituted if the specification calls for 6/#10 cans.</p> | <ul style="list-style-type: none"> ■ Staple ingredients ■ Spices |

Product Categories Worksheet Answer Key, continued

| Product Category | Description | Examples |
|----------------------|---|---|
| Private Label | <ul style="list-style-type: none"> Does this product comply with the Buy American provision? Is it “domestic only” or 100% produced and processed in the United States substantially using agricultural commodities produced in the United States, meaning that over 51 percent of a food product must consist of agricultural commodities grown domestically? Are packed under industry acceptable standards Represents the supplier’s brand <p>Note: Many distributors have their own private label brand and prefer to sell it instead of brand name items. Again, although the supplier will choose the brand, it must still conform to the specification. In many cases, it is worth the task of tasting these products.</p> | <ul style="list-style-type: none"> Canned fruits and vegetables Frozen vegetables |
| Manufacturer’s Brand | <ul style="list-style-type: none"> Does this product comply with the Buy American provision? Is it “domestic only” or 100% produced and processed in the United States substantially using agricultural commodities produced in the United States, meaning that over 51 percent of a food product must consist of agricultural commodities grown domestically? Are recognized by name and generally attract customers who are loyal to their name Are usually main entrees, contain multiple ingredients, and are processed <p>Note: It is important to ensure that the product is available if it is on the menu. Consistent products propel average daily participation and keep customers returning. These products are subject to tremendous variation in quality among brands.</p> | <ul style="list-style-type: none"> Chicken nuggets Burritos Whole grain French toast |

Lesson 5: Product Screening

Objective: Create a sample product screening evaluation tool.

SHOW SLIDE: *Screening Products*

SAY:

Some schools may find that their customers prefer certain brands, which increases the number of meals served. The purpose of conducting a screening is to provide a list of preapproved, equal product brands in the solicitation document. The procurement procedures must ensure maximum full and open competition. Federal regulations clearly forbid specifying only a brand name product instead of allowing a preapproved equal product to be offered.

(Workbook Handout): Product Screening Chart

DO:

Refer participants to the **Product Screening Chart** handout located in the Participant's Workbook. Review the handout.

Instructor's Note: Discuss the type of screening and description for each screening. The participants will need to be familiar with the information to complete the **Pasta Primavera Screening Evaluation Tool** activity.

Product Screening Chart

The purpose of conducting a screening is to provide a list of preapproved, equal product brands in the solicitation document. The procurement procedures must ensure maximum full and open competition. Federal regulations clearly forbid specifying only a brand name product instead of allowing a preapproved equal product to be offered.

| General Information | Criteria |
|--|--|
| <p>Screening products is not required. SFAs should be careful to ensure they do not inadvertently exclude potential vendors.</p> <p>Before beginning the screening process, determine criteria of what is wanted or expected for the product.</p> <p>The three ways of screening products include paper, appearance, and taste screenings.</p> <p>Establishing the evaluation criteria in advance may reduce the possibilities of future bid protests.</p> | <ul style="list-style-type: none"> ■ Conduct paper, appearance, and taste screening separately and establish the criteria for an acceptable product. Each type of screening will have a different evaluation process. ■ Determine a method to review brands for prior approval. <ul style="list-style-type: none"> ○ All screening evaluations should allow for all potential vendors to provide a product for screening during the solicitation period (e.g., public advertisement) ■ Establish procedures to review brands for prior approval <ul style="list-style-type: none"> ○ even doing so during the solicitation process, ○ after the solicitation is published, and ○ before bids/responses are due. ■ Provide all interested potential respondents with a copy of the screening procedure. ■ Log all samples received from vendors. <ul style="list-style-type: none"> ○ Keep accurate records of all three screenings. You may be asked to justify your choices. |

Product Screening Chart, continued

| Paper Screening | Criteria |
|---|---|
| <p>A paper screening is the process of reviewing the product label provided by the distributor. The label contains a description of the product, the code number, the ingredients, and a nutritional analysis. The Buy American provision applies to agricultural commodities produced in the United States and a food product that is processed in the United States when purchased for serving in the school meals program.</p> <p>Schools must purchase domestic commodities and products, to the maximum extent practicable (2 CFR 210.21(d)). Schools should plan and adjust their procurement practices to meet the phased-in non-domestic food cost caps:</p> <ol style="list-style-type: none"> 1. School Year 2025–2026: 10% 2. School Year 2028–2029: 8% 3. School Year 2031–2032: 5% <p>These caps apply to the total commercial food costs purchased, aiming to assist schools in gradually adapting to the new requirements (U.S. Department of Agriculture. (2024, May 29). SP 23-2024: <i>Buy American provisions related to the final rule titled, Child nutrition programs: Meal patterns consistent with the 2020-2025 dietary guidelines for Americans</i>. https://www.fns.usda.gov/cn/buy-american-provisions). If the product has passed the label and nutritional screening, proceed to the appearance screening.</p> | <ul style="list-style-type: none"> ■ Review the product label provided by the distributor. For processed food products, does the manufacturer's product information sheet include specific information about the percentage of domestic foods to produce and process the product in the United States? (Substantial means 51% or more is domestic) <ul style="list-style-type: none"> ○ The label contains a description of the product, the code number, the ingredients, and a nutritional analysis. If the product has passed the label and nutritional screening, and is processed, review the product information sheets for specific information about domestic products produced and processed in the United States. Obtain an attestation to confirm if the information is not available on the label or product information sheets. ■ Determine if the product complies with the specifications. ■ Confirm the product meets the federal guidelines for the SNPs. ■ Determine the meal pattern contribution. ■ Calculate the cost based on per serving or per unit price. ■ Determine if the product is affordable. ■ Determine the labor cost to prepare the product. ■ Identify possible menu items. ■ Proceed to the appearance screening. |

Product Screening Chart, continued

| Appearance Screening | Criteria |
|--|--|
| <p>An appearance screening is the process of examining the appearance of the sample. The most important aspect of the appearance screening is the product itself.</p> <p>Before beginning the appearance screening, determine evaluation criteria of what is wanted or expected for the appearance of the product. For instance, the roll should be golden brown with a slightly crunchy crust; a baguette would be long and thin and would not pass appearance screening if it looked like a Kaiser roll.</p> <p>If a consensus cannot be agreed upon what the product should look like, it will be impossible to determine if the product passes this screening.</p> | <ul style="list-style-type: none"> ■ Purchase the products for the appearance screening. Not only is purchasing the product a good business practice it will ensure the product SKU/code will be the actual product used for the appearance screening. ■ Determine minimal acceptable and unacceptable attributes ■ Include sample criteria such as: <ul style="list-style-type: none"> ○ Consistent in shape ○ Light brown in color ○ Even color ○ Even cut pieces ○ Topping evenly spread ○ Minimal leaves ○ Fill ratio ■ Determine the attributes of the package. For example <ul style="list-style-type: none"> ○ Does it come in an individually wrapped package? If so, is it easy to open? ○ Is the packaging attractive? ○ Does it come layered in a case with parchment between the layers? ○ Does the packaging maintain the integrity of the product during shipping and handling? |

Product Screening Chart, continued

| Taste Screening | Criteria Quantifier |
|---|--|
| <p>A taste screening is the process of conducting a taste test with your customers. Some products are too highly seasoned, too greasy, too salty, or too sweet. The goal is to offer customers good tasting, high quality products.</p> <p>Once the product(s) have gone through the adult taste screening, it is time for the student customers to give their opinion. Taste testing is the final screen and determines whether the brand or the product will be preapproved to be placed on the bid.</p> <p>A simple method for taste testing with elementary students involves using two containers, one labeled with a smiley face and one with a frown. The students vote by placing a small piece of color paper in the appropriate container—smiley for acceptable and frown for unacceptable.</p> <p>In the same manner, at the junior and high school levels, the containers can be labeled either acceptable or unacceptable.</p> | <ul style="list-style-type: none"> ■ Determine in advance the criteria for documenting the results of the taste test. ■ Purchase the products for the taste test. Not only is purchasing the product a good business practice it will ensure the product SKU/code will be the actually product tested. ■ Create an evaluation tool. Consider including a description for the texture, flavor, seasoning, how the product holds after cooking, and overall acceptance of the product. ■ Determine in advance an acceptability percentage such as 85% approval for products to be placed on the bid. ■ Prepare the product according to manufacturer's direction. ■ Do not identify the brand name of the product. ■ Prepare similar products for tasting at approximately the same time and hold product at proper temperatures. ■ Set up taste test area. Remember to include napkins, plates, spoons, forks, knives, and water to rinse mouth between tastings. ■ Conduct a taste test with adults and students. |

SHOW SLIDE: *Sample Screening Evaluation Tool*

SAY:

We are now going to take a few minutes to apply the concepts for screening products. To do this, we will divide into small groups. Each group will create an evaluation tool for a whole grain-rich, frozen, pasta primavera using one of the following:

- Paper screening
- Appearance screening
- Taste screening

(Activity): Pasta Primavera Screening Evaluation Tool

DO:

Divide participants into a minimum of three groups. Assign each group a topic. Distribute flip chart paper to each group. Ask the groups to place the topic as a header on the flip chart paper and create a screening evaluation tool for the assigned topic. At the end of the activity, ask each group to report on their evaluation tool. Post the screening evaluation tools on the wall.

Instructor's Note: Encourage groups to spread out throughout the room.

Lesson 6: Product Specifications

Objective: Practice writing a mock product specification.

SHOW SLIDE: *Product Specifications*

SAY:

A product specification is a concise statement of a set of requirements to be satisfied by a product, material, and/or process. Some specifications are very brief, while others may be quite extensive. It is important to develop specifications that are not overly restrictive to competition. Specifying a brand name only product instead of allowing a preapproved equal **product to be offered restricts full and open competition.**

Good Practices

- Check to see if there is a generic, not a name brand, product available online.
- Seek feedback from other districts regarding a comparable product.
- Create a product specification that will meet the needs of the district.

(Workbook Handout): Product Specification Summary Chart

DO:

Refer participants to the **Product Specification Summary Chart** handout located in the Participant's Workbook. Discuss each characteristic identified on the chart.

Product Specification Summary Chart

A specification is a concise statement of a set of requirements to be satisfied by a product, material, and/or process. Some specifications are very brief, while others may be quite extensive. The clearer the specification, the more likely you will receive the anticipated product. It is important to develop specifications that are not overly restrictive to competition. Specifying a brand-name-only product instead of allowing a preapproved equal product to be offered restricts full and open competition.

| Characteristics | Description |
|---------------------------------------|---|
| Specifications Characteristics | <ul style="list-style-type: none"> ■ Can be difficult and time consuming because the descriptions are often long and very detailed ■ Can be limited to only those characteristics that are essential for communicating with the supplier, such as the Standard of Identity (SOI), quality, grade, and size |
| Common Language | <ul style="list-style-type: none"> ■ Common language of the industry ■ Provide a clear product description |
| Multi-Ingredients Foods | <ul style="list-style-type: none"> ■ May require research ■ May be necessary to obtain product for appearance and tasting screening |
| Description of Product | <ul style="list-style-type: none"> ■ Must clearly indicate that vendor may quote on brand name or preapproved equal products to ensure maximum full and open competition. Identify product listed, the type of product, the cut of product (e.g., filet), the portion size, the precooked weight, and whether it is frozen, or fresh, or dry ■ Include the manufacturer's name, the manufacturer's name for the product (e.g. rounds, triangles, and dips), the manufacturer's code number, and the manufacturer's pack size) |
| Case Pack and Weight | <ul style="list-style-type: none"> ■ Describes how the item is packaged (e.g., 6/#10 cans, or 4/5# loaves, or not to exceed 25#, individually wrapped, 48 to the case, cannot exceed 30 pounds) |
| Main Ingredients | <ul style="list-style-type: none"> ■ Describes the main ingredients (e.g., pinto beans, black beans, whole grain-rich tortilla) |

Product Specification Summary Chart, continued

| Characteristics | Description |
|--------------------------------------|---|
| Minimum and Maximum Sizes and Pieces | <ul style="list-style-type: none"> Describes the minimum and maximum size of the product (e.g., each serving must weigh a minimum of 3.9 ounces and cannot exceed 4.1 ounces) |
| Other Product Ingredients | <ul style="list-style-type: none"> Describes what products can be included (e.g., whole-grain pasta, whole-wheat flour or product may include spices, emulsifiers, vegetable purees, and thickening agents) |
| Prohibited Ingredients | <ul style="list-style-type: none"> Describes what items are prohibited (e.g., food additives, artificial colors and flavors, hydrogenated fat, monosodium glutamate (MSG), dairy, wheat, soy, eggs, peanuts, tree nuts, fish, crustaceans) |
| Nutritional Standards | <ul style="list-style-type: none"> Describes the nutritional standards for the product, the minimum or maximum nutrient or ingredient requirements or limitations (e.g., pinto beans and black beans combined must provide a 1.5 ounce equivalent for the Meat/Meat Alternate, and the whole grain-rich tortilla must provide a 1.5 ounce equivalent for the Grains component for the NSLP. Product must meet NSLP requirements) |
| Unit Award is Made | <ul style="list-style-type: none"> Describes how the unit price will be determined (e.g., by the case, by the serving, per pound) |
| Quality Indicators | <ul style="list-style-type: none"> Describes the quality indicators (e.g. U.S. grade, U.S. Standard for fresh apples, Prime, Choice) |
| Meal Pattern Requirement | <ul style="list-style-type: none"> Describes if the product meets certain meal component requirements or is required to have a CN Label |
| Run Code | <ul style="list-style-type: none"> Describes the production run number Identifies the code that identifies the production plant, the date, the shift, and the production line that manufactured the product It is not printed on the label, but rather it is stamped on the case at the time the product is manufactured. |

(Workbook Activity): Mock Bean Burrito Product Description

SAY:

Let's use the information we've just covered to create a product description for a whole grain bean burrito.

DO:

Divide participants into groups. Ask participants to locate the **Mock Bean Burrito Product Description Worksheet** in the Participant's Workbook. Review the instructions.

At the conclusion of the activity, ask each group to share the product descriptions for each characteristic identified on the worksheet. Ask the other groups if they have a different description. Refer participants to the **Mock Bean Burrito Product Description Worksheet Answer Key**. Reinforce the importance of clear, concise product descriptions.

***Instructor's Note:** The activity illustrates the importance of writing clear product descriptions. By allowing each group to develop separate product descriptions, the outcome of this activity will demonstrate a variety of responses for a bean burrito.*

Mock Bean Burrito Product Description Worksheet

Answer Key (Example)

Instructions: Create a product description for each of the characteristics in bold font for a bean burrito. Write your response in the space provided for each characteristic. Refer to the **Product Specification Summary Chart**.

Description of the Product: two-bean burrito on a whole grain-rich tortilla

Case Pack/Weight: 72 to the case; paper between layers; individual bulk pack; individually quick frozen (IQF), bulk case cannot exceed 22 lb. in total weight

Minimum and Maximum Size and Pieces: 3.9 oz and cannot exceed 4.1 oz

Main Ingredient(s): pinto beans, black beans, and an individual whole grain-rich tortilla

Other Product Ingredients: product may include spices, emulsifiers, vegetable purees, and thickening agents

Prohibited Ingredients: product cannot contain dairy, beef, chicken, pork, fish by-products, or monosodium glutamate (MSG)

Nutritional Standards: Pinto beans and black beans combined must provide a 1.5-oz eq. for the Meat/Meat Alternate. The whole grain-rich tortilla must provide a 1.5-oz eq. and must include 50% whole grains by weight or have whole grain as the first ingredient for the Grains component for the National School Lunch Program. The product must contain between 300–350 calories, must have less than or equal 35% calories from total fat, less than 10% calories from saturated fat, zero *trans* fat, and may not exceed 230 mg sodium.

Mock Bean Burrito Product Description Worksheet

Answer Key (Example), continued

Meal Pattern Requirements/Child Nutrition (CN) Label: CN Label preferred or product must meet 1-oz eq. for the Meat/Meat Alternate, and the whole grain-rich tortilla must provide a 1.5-oz eq. for the Grains component for the National School Lunch Program.

Unit on Which Award is Made: based on unit price for acceptable products

Quality Indicators: private label or manufacturer's brands are subject to internal quality screening; golden brown color, ability to hold in warming cabinet for up to 1 hour

Lesson 7: Child Nutrition (CN) Label Products

Objective: Examine the features of a Child Nutrition Label.

SHOW SLIDE: *Child Nutrition (CN) Labeling Program*

SAY:

The USDA Child Nutrition (CN) Labeling Program provides food manufacturers the option to include a standardized food crediting statement on their product label. Labels must be authorized by FNS prior to use, and manufacturers must have quality control procedures and inspection oversight that meet FNS requirements. Companies that state a product meets a meal pattern component and do not include an authentic CN Label must be evaluated using the criteria to credit other non-CN Label products.

The program requires an evaluation of a product's formulation by FNS to determine its contribution toward the meal pattern requirements. It allows manufacturers to state this contribution on their labels. The program provides a warranty against audit claims for purchasers of CN Label products.

It is important to allow adequate lead time for the arrival of CN Label products to coincide with menu usage. Having too little inventory, too much inventory, or making last minute substitutions can be detrimental to inventory management. Inventory management has long been considered a critical component of a well-managed school nutrition program.

SHOW SLIDE: *CN Label*

SAY:

There is no federal requirement that forces companies to make or school districts to purchase products with a CN Label. Purchasing decisions are left at the local level. If a product with a CN Label is desired, this must be clearly stated in purchasing specifications.

A CN Label

- identifies the contribution of a product toward the meal pattern requirements and serves as protection from claims about a product;
- provides a warranty against audit claims if the CN Label product is used in accordance with the manufacturer's directions; and
- simplifies cost comparison of similar products.

ASK:

Are CN Label products more expensive than non-CN Label products?

FEEDBACK:

CN Label products may cost more. Special labeling requirements, inspection costs, and extra staff costs to monitor quality control may be contributing factors in CN Label products costing more than a similar non-CN Label product.

ASK:

Are CN Label products healthier than non-CN Label products?

FEEDBACK:

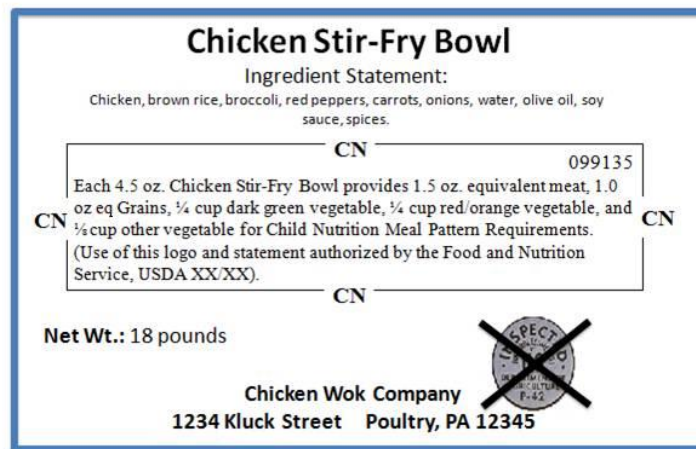
A CN Label does not indicate that the product is healthier or more nutritious than a similar non-CN Label product.

(Workbook Handout): Sample CN Label

DO:

Refer participants to the **Sample CN Label** handout located in the Participant's Workbook.

Sample CN Label



The CN Label product will always contain the following information:

- the CN logo, which has a distinctive border,
- the meal pattern contribution statement,
- a unique 6-digit product identification number (assigned by FNS) appearing in the upper right hand corner of the CN logo,
- the USDA/FNS authorization statement,
- the month and year of final FNS approval appearing at the end of the authorization statement, and
- the remaining required label features, which includes the
 - product name
 - inspection legend
 - ingredient(s)
 - statement
 - signature/address line
 - net weight

CN numbers that appear on the valid list apply to the CN Logo and Crediting Statement only. It is the manufacturer's responsibility to ensure that the product label meets all federal labeling requirements. To

check the CN Verification Report and CN Manufacturer's Report visit:

<https://www.fns.usda.gov/cnlabeling/usdausdc-authorized-labels-and-manufacturers>.

Lesson 8: Forecasting

Objective: Discuss the importance of accurately forecasting products.

SHOW SLIDE: *Forecasting*

SAY:

Forecasting is the process of analyzing current and historical data to determine future trends. In the case of SNPs, forecasting involves using menus to estimate the quantity of goods and/or services needed in specified areas and/or assessing needs by reviewing the availability of USDA Foods. It helps to maximize the use of a product. Forecasting allows manufacturers and distributors to prepare responses to

- bids/proposals,
- order product (if awarded the contract), and
- deliver available products to meet the terms, conditions, specifications, and requirements of SFAs.

SHOW SLIDE: *Average Daily Participation (ADP)*

SAY:

Forecasting involves knowing the Average Daily Participation (ADP) in each program operated.

The ADP for the National School Lunch and School Breakfast Program is the number of students that participate in the school meals program on an average day. Calculating ADP in this manner is considered fairer to schools, as it includes only children that eat lunch/breakfast in the calculation and excludes children who are present during the school day but do not eat lunch/breakfast (i.e., part-day kindergarteners).

Regardless of a district's ADP, accurate forecasting provides critical and valuable information. This information benefits both the school district and potential distributors who are considering bidding on the items solicited.

SHOW SLIDE: *Strengthening Bid Integrity***SAY:**

The integrity of a bid is strengthened when time is spent developing good forecasts. Distributors can be confident that the items specified on the bid and the quantities listed are accurate to the best of the district's ability. With this knowledge, the distributor is willing to provide their most competitive pricing.

Adequate forecasting is critical between not only district and distributor, but also further along the supply chain to the manufacturer of the product. A manufacturer or distributor does not want to maintain too much inventory for fear that it will expire before the district can utilize the quantities on hand.

SHOW SLIDE: *Sample Velocity Report***SAY:**

Forecasting involves reviewing velocity reports from the distributor of foods and the quantity delivered to the district during the prior contract period. Velocity reports provide the quantity, date of purchase, and other valuable information about each item received. The report serves as one tool for the SFA staff to use when forecasting the needs of the district and documents bid integrity. The SFA must also use the current menu and availability of USDA Foods, as menus and USDA Foods change from one year to the next. These changes may be due to the school calendar, new products available that are included on the menu, as well as the availability of USDA Foods. Upon request, the distributor can generate a velocity report for products purchased during a specific time period. Plus, many distributors have online ordering systems that allow the SFA to generate a velocity report at any time.

Distributors have the ability to review quickly what they have sold in the past against what was stated as the bids/proposals quantity. Distributors know when forecasted quantities are inaccurate or usage is not closely met. After one year's history, it is easy to see product surplus or shortages. Product surplus or shortages may result in increased prices for future bids/proposals.

Forecasting is a detailed task and requires planning and multiple steps. To help visualize this concept we are going to do a quick activity.

(Activity): Forecasting

SAY:

I am going to count you off into two groups. Ones please line up single file at the front of the flip chart paper on the left, and Twos please line up on the right. I am going to give the person in front a marker. When I say, "Go," write a word next to any letter that relates to a concept learned in today's training. For example, participants may put the word "costs" for the letter "C" or "tasks" for the letter "T." For tough letters like "X" and "Z," participants can use a word that incorporates that letter such as "examples" and "analyze." You do not have to go in alphabetical order.

The front person will then pass the marker to the next person in line, and go to the back of the line. The person with the marker will write the next word, pass the marker to the person behind them, go to the back of the line, and so on until the alphabet is complete. The two teams will race against each other to fill out the flip chart first with ideas and concepts from the day's training. You can use any charts on the walls, the Participant's Workbook, and each other for help.

When all teams have completed the activity, circulate around the room and review the words associated with each letter.

DO:

Write the alphabet on two pieces of flip chart paper. There should be enough room beside each letter to write a word. Split the class into two groups and have them line up single file in front of the flip chart. Give the person in the front of the line the marker. When you say go, the two teams will race against each other to fill out the flip chart with ideas and concepts from the day's training. For example, participants may put the word "costs" for the letter "C" or "tasks" for the letter "T." For tough letters like "X" and "Z," participants can use a word that incorporates that letter such as "examples" and "analyze." They do not have to fill it out in alphabetical order, and they will continue to fill out the charts until the

alphabet is complete. The first team to complete the flip chart paper wins. Participants can use any charts on the walls, the Participant's Workbook, and each other for help. This activity will take about 5 minutes.

Instructor's Note:

Divide participants into groups no larger than 12 participants each. Prepare enough flip chart papers so each group will have one identical paper. Place the header "Forecasting" on the flip chart paper. Make two columns under the header. Write the first half of the alphabet in one column and write the other half of the alphabet in the second column. Ask participants to line up single file and take turns identifying one word or phrase that pertains to forecasting. The participants will need to think of a word or phrase for each letter of the alphabet. Next to the Depending on size of class, another flip chart and team may be needed. Groups should be no larger than 6–8 people. Make sure to check your roster before class to determine how many teams you will need for this activity. Allow five minutes to complete the activity. Participants can be very creative and all responses are acceptable.

Example flip chart paper

| Forecasting | |
|-------------|---|
| A | N |
| B | O |
| C | P |
| D | Q |
| E | R |
| F | S |
| G | T |
| H | U |
| I | V |
| J | W |
| K | X |
| L | Y |
| Menu | Z |

SHOW SLIDE: *Forecasting is a Process***SAY:**

It is important to accurately forecast the goods and/or services needed in specified areas for the coming year. Let's look at how forecasting is applied in the SNPs using information available to the SFA, such as the ADP, velocity reports, and USDA Foods availability. All of this information is used to estimate the goods and/or services needed in specified areas for the coming contract period, and/or to assess needs for current procurement activities. Forecasting allows procurement plans to evolve each fiscal year.

SHOW SLIDE: *USDA Foods*

SAY:

Another key feature in forecasting involves contemplating the availability of USDA Foods for the coming contract period. Many school districts have the ability to purchase ready-to-use processed end products made from USDA Foods. Ready-to-use processed end products allows for the use of USDA Foods in the final production of many mainstay menu items. By utilizing USDA Foods in the final product, there can be a cost savings to the district for high quality products. Check with the state food distribution agency to determine what is allowed before entering into a contract. Clarify state procurement procedures, specifically if the state conducted a competitive procurement for the processed end products, or if the SFA must conduct a competitive process. States may also have limitations on pricing structures and method of distribution of these items.

SHOW SLIDE: *Forecasting—Past, Present, and Future*

SAY:

Establishing valid forecasts requires reflection on the past, consideration of present menus and purchasing conditions, and estimates required for future needs. Some considerations include

- student preferences; revenue from the previous year;
- the current inventory; the upcoming year's menu;
- locally grown, locally raised, and/or locally caught menu items; the likely cost of labor, goods, products, or services in the coming year (season);
- the number and ages of the students being served throughout the school year; and
- relevance of the last solicitation document.

(Workbook Handout): Forecasting Questions; Past, Present ,and Future

DO:

Refer participants to the **Forecasting Questions: Past, Present, and Future** and **Forecasting Good Practices** handouts located in the Participant's Workbook.

Forecasting Questions: Past, Present, and Future

The following are examples of past, present, and future types of questions to consider when forecasting procurement needs.

The Past

- Has the serving of this item increased, decreased, or remained the same?
- What are the revenues from the past year?

The Present

- In what meal service is the item menued?
- For what grade levels is the item menued?
- What is the edible portion (EP) cost of the product?
- Is the price of this item cost effective, including the impact of utility and waste removal costs?
- What menu items are grown locally?
- How often does the item appear on the menu?
- Is the menuing of this item contingent on the availability of USDA Foods?
- What is the current inventory?
- Is there sufficient storage space including, space for recyclables?

The Future

- What is the upcoming year's menu?
- Will the item continue to be menued to the same clientele and in the same frequency as it is currently?
- Will the product still be available in the manufacturer's portfolio?

- Are there any changes in menu or meal requirements that no longer allow this item to be served in the same manner as it has been previously? Will this force the item to be menued to different grade levels?
- Is the item still affordable?
- Is it necessary to divert or order USDA Foods to produce this item?
- What is the estimated dollar value of procurements for the upcoming year?

(Workbook Handout): Forecasting Good Practices

DO:

Discuss the **Forecasting Good Practices** handout located in the Participant's Workbook.

Forecasting: Good Practices

Forecast items accurately. The SFA staff should be prepared to provide the State agency with some details on how the products and quantities were projected.

Answer the past, present, and future questions. The answers to these questions will provide a more reliable forecast to ensure only necessary purchases are made in accurate quantities.

Utilize cycle menus. The inclusion of cycle menus contributes to a more efficient procurement process. Cycle menus provide the opportunity to analyze menu items and determine similarities among recipes. Cycle menus also allow locally grown, locally raised, and/or locally caught and seasonal foods to be incorporated in the menu. Identifying similar menu items for different recipes can lead to a reduction of inventory and a cost savings. School nutrition staff should become familiar with the standardized recipes and learn preparation efficiencies for producing a quality product.

Review production records. Production records log the daily amounts served and how much of the prepared food remains after the product is served. It is important to review production records on a daily, weekly, or monthly basis. Production records are used for future meal planning and determining the popularity of an item. Production records provide valuable information when forecasting quantities to purchase and controlling waste of a product.

Conduct surveys or taste panels to determine customer satisfaction. The survey or taste panel can include current menu items and potential menu items for consideration.

Ask the distributor to generate a velocity report for products purchased during a specific time period. The report can serve as a tool for the SFA staff when forecasting the needs of the district and documenting bid integrity.

Record the current inventory. Conducting inventory before creating the solicitation document will help ensure only necessary products are ordered.

Forecasting: Good Practices, continued

Calculate the amount of product to purchase and the number of servings to prepare. The AP weight is the amount of product to be purchased. The EP weight is the amount of product that can be consumed. The AP weight is greater than the EP weight. Calculating the AP quantity allows the SFA to purchase based on the anticipated number of servings of the item. The calculation provides an estimated quantity of food needed to be purchased to meet the anticipated number of servings to meet the portion size. For additional information, refer to the USDA Food Buying Guide (FBG) Calculator via the following link: <http://fbg.theicn.org>. It is important to remember to use standardized recipes for accurate servings, portion sizes, and nutrition information applicable to your specific operation.

Complete an electronic monthly grid with estimates. Depending on the size of the district and the number of different items being procured, it may be necessary to develop specific product forecast electronic forms to meet a district's needs.

Include the school's name, product specification, case size, and date. Using the USDA FBG Calculator, determine the number of servings and calculate the amount to purchase for each month during the duration of the bid period. Total the calculations for each month to determine the annual product usage. Use past production records and future plans for menu planning to forecast the quantity of food needed prior to issuing a solicitation document. Consider summer recesses, holidays, and other school breaks that would affect forecasts.

Realistic Expectations

Forecasting a minimum of 6 weeks in advance is not a federal regulation but is considered a good practice. It is unrealistic to expect the awarded distributor or manufacturer to have products and quantities specific to your district readily available in their inventory. Stakeholders of the supply chain need adequate preparation time to process and deliver the anticipated quantity. In the event that forecasts are not available for proprietary products, products manufactured strictly for your program, or for products unique to that manufacturer, allowing as much time to process the request for products becomes even more critical.

SHOW SLIDE: *Conclusion***SAY:**

We have covered a wide variety of topics. In addition, by completing the activities and networking with your peers, you have gained valuable information that will contribute to your effectiveness as a trainer. Topics covered in this training included

Activity): Take Home Messages**DO:**

Ask participants to write on a self-adhesive note, one or more take home messages for each of the following topics. Ask the participants to place the self-adhesives note on the appropriate flip chart paper.

- Stakeholders
- Menus
- Inventory, Product Movement, and Cost Management
- Product Categories
- Products Screening
- Product Specifications
- Child Nutrition Labeling Products
- Forecasting

Instructor's Note: Place the following topics on separate flip chart papers.

- *Stakeholders*
- *Menus*
- *Inventory, Product Movement, and Cost Management*
- *Product Categories*
- *Products Screening*
- *Product Specifications*
- *Child Nutrition Labeling Products*
- *Forecasting*

Instructor's Note: *If time permits, ask participants to share some of their take home messages. Review questions submitted on the Bike Rack.*

SHOW SLIDE: Thank You

SAY:

Look at all the take-home messages you can utilize to forecasting accurate quantities of food.

This concludes today's training. Thank you for your active participation and attention in the training. If there are no more questions, we will proceed with the training post-assessment and evaluation.

(Activity): Post Assessment and Evaluation

DO:

Distribute the post-assessment and the evaluation form. Review the assessment answers. Distribute certificates. If this is an ICN training, distribute and collect the evaluations.

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