

**Protein  
Procurement  
Toolkit**

# Table of Contents

Introduction	1
How to get started	2
• Nineveh-Hensley-Jackson School Corporation School Highlight	4
Safety Factors Overview	5
• Meat and Poultry	
• Eggs	
• Dairy-Based Product	
Procurement Overview	6
• Determining your method	
◦ Informal: Micro-Purchase Method	7
▪ Richland Bean Blossom School Corporation School Highlight	8
◦ Informal: Small Purchase Method	9
▪ New Albany Floyd County Schools Highlight	10
◦ Formal: Large Purchase Method	11
Crediting Meat / Meat Alternates	12
Using the Food Buying Guide	13
Standardized Recipes	16
Nutrient Analysis	17
Frequently Asked Questions	18

# Introduction

We hope you all enjoyed celebrating local proteins for Food Day 2023. This toolkit was developed to address challenges that Child Nutrition sponsors experience when procuring local proteins. This is meant to be used by schools and childcare centers in conjunction with The Indiana Department of Health's (IDOH) [Indiana Grown for Schools Procurement Toolkit](#), an extensive, in-depth look at procuring a variety of locally produced ingredients and menu items. This particular toolkit will provide an overview for schools and childcare centers as they begin to procure, process, and serve local protein.

This toolkit was developed under the United States Department of Agriculture's 2022 Patrick Leahy Farm to School Grant.

Questions about local procurement? Please email [f2s@doe.in.gov](mailto:f2s@doe.in.gov)

Questions about procurement thresholds? Please email [scnfinance@doe.in.gov](mailto:scnfinance@doe.in.gov)

# How to Get Started

There are many ways to begin the process of procuring local protein. Depending on your program, you can decide which step makes the most sense for how you want to proceed. If you have a local farm near you, that you know has the capacity to sell to the school, start with whatever products they offer and expand from there. If you have a specific product in mind, start there and find a farmer that can supply that product. We suggest thinking of the following questions, as you get started.

1

## What would you like to procure locally?

- Some product examples are beef patties, ground beef, pulled pork, chicken breasts, hard boiled eggs, yogurt, or cheese.
- Think about specifics such as:
  - Items you need
  - Pack sizes you would need
  - Months you are interested in the product
  - Price range
  - Quantity per week / month / year

2

## Where will you procure from?

- You can procure local food from the following places:
  - a. **Directly from a farmer or producer** - If you are working directly with a farmer or producer, developing a relationship with them is an important part of local procurement. Explaining your needs and being open and honest will help establish some groundwork for a partnership. Mutual respect, understanding of the other's job, and trust are all important components of the relationship. You can do this by:
    - i. Contacting IDOH [Value Chain Professional \(VCP\)](#) for help finding and building a relationship with a farmer.

## 2<sub>cont.</sub>

ii. Finding the contact information of a farmer and connecting with them directly either by phone or email. You can find producers on the [Indiana Grown for Schools Producer Guide](#).

1. See Appendix B and C of the [Indiana Grown for Schools Procurement Toolkit](#) for examples of how you can document quotes.

iii. After you have established a connection point:

1. Communicate the products you need and other information such as, amount, time of year etc.

2. Ask them what products they have that might fit your needs.

a. See Appendix G of the [Indiana Grown for Schools Procurement Toolkit](#) for an example of what you could ask the producer or farmer to fill out.

b. **From your mainline distributor** - Some mainline distributors have local options. Contact your sales representative to learn about your company's options.

c. **Through a food hub** - A food hub is fundamentally a distribution center for locally produced food products.

i. Indiana does not have many food hubs, however, some are in the works as of today.

ii. Food Hubs

1. [Region Roots](#)

## 3

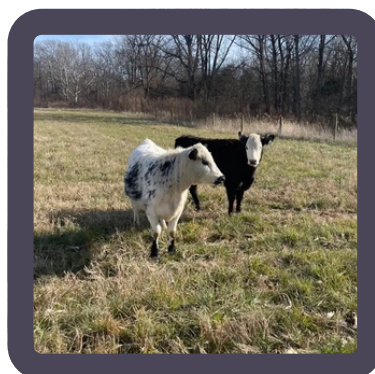
### What procurement method will I need to use?

- If you know how much you are going to be spending, you can easily decide which procurement method you will need to use.
- If you are just getting started, most likely you will start small. Therefore, it is probably a safe guess to start by following the micro-purchase threshold and then update the procurement method as needed.

# Nineveh-Hensley-Jackson School Corporation

Indian Creek Schools has its very own farm. How exciting is that? The farm is called the Creek Cattle Company (CCC). The agriculture (AG) teacher, Mr. Dunn, oversees the CCC with the help of the AG students. The students run the farm as a business with positions like CEO, VP of Operations, Sales Manager, and Marketing Manager. The AG students do the work to raise, feed, and care for the cattle until they reach their ideal weight. The beef is processed locally, and the food service department buys the ground beef from the CCC. We currently use the beef for burgers and walking tacos. We are hoping to expand into other menu applications in the future. Our child nutrition specialists patty the meat themselves. We generally serve about 1200 burgers each time! We spent approximately \$15,000 on fresh ground beef purchases. The money goes back into the farm to buy, feed and care for more cattle.

Beth Frisbie, Director of Food Service



# Safety Factors Overview

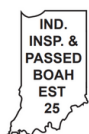
Prior to delving into any local procurement, you must contact your local health department to ensure there are no local ordinances or requirements, that are different from the state.

## Meat and Poultry

- According to state guidelines, meat and poultry purchased for Indiana schools must be processed at a state or USDA inspected processing facility.
  - Generally you are purchasing from a farmer, so you need to ensure they are processing at an approved facility.
  - Find a list of all state inspected meat processing facilities [here](#).

**There are different types of emblems associated with different inspections.**

In-state meat and poultry



Out of state - Poultry



Out of state - Red Meat



If purchasing across state lines, meat must be processed in a facility that participates in the cooperative interstate shipping program (CIS) and be labeled as such or be processed in a USDA inspected facility.

## Eggs

Please contact [IDOE Farm to School Team](#) if you are wanting to procure local eggs to discuss the options.

## Dairy Based Products

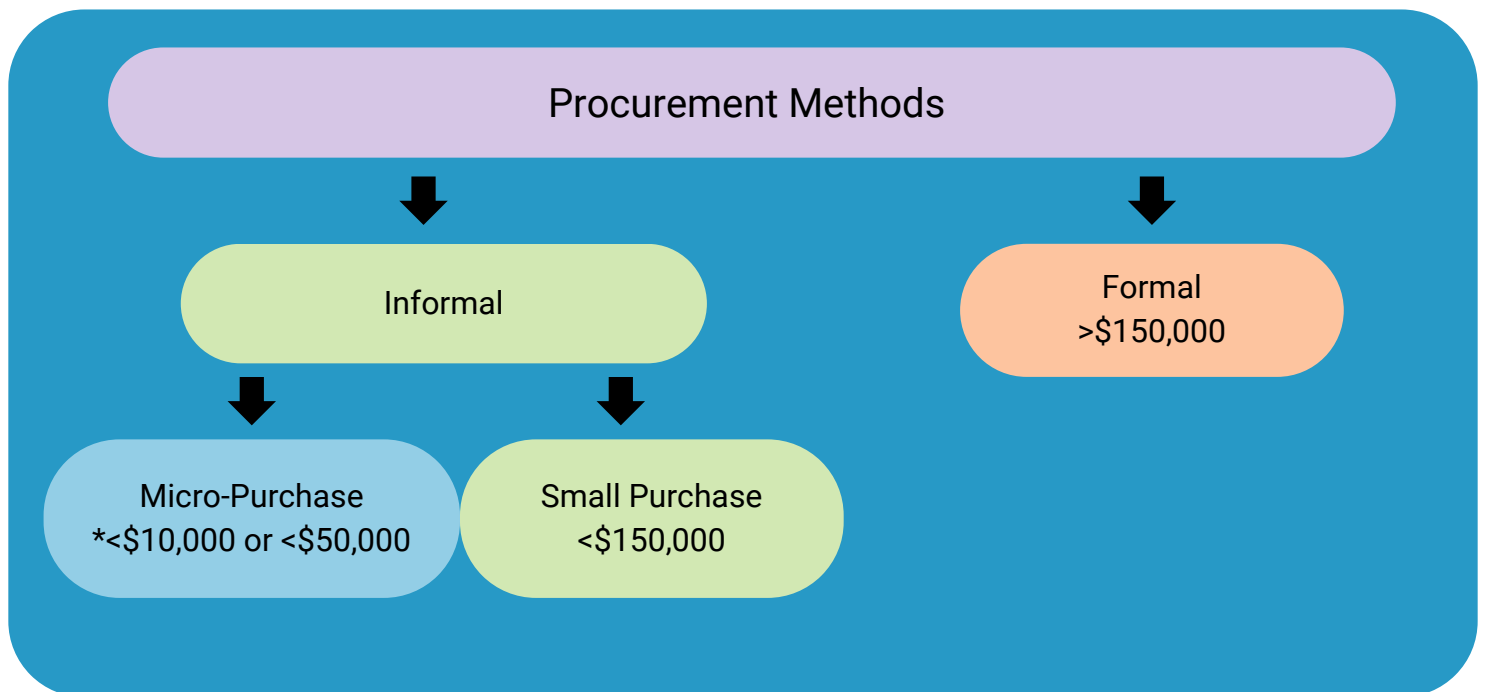
According to state guidelines dairy products must be purchased from a state or USDA inspected facility.

- To find a list of State Inspected Facilities, see [here](#).

# Procurement Overview

Using the proper procurement method is important with any school or childcare center purchase. These guidelines are not specific to local procurement and are the standard procurement rules. There are three different methods to use, based on the amount you are spending with a given vendor, in a given year.

**NOTE: According to the Geographical Preference Expansion Related to the Final Rule, you can now use “local” as a product specification for unprocessed local food, as of the 2024.**



\*Your micro purchase threshold is determined by your school corporation or childcare center. All entities are automatically set at a threshold of \$10,000, in Indiana. Public schools and public childcare centers are able to self-certify up to \$50,000. Parochial schools, other private schools, non-profit childcare centers, and for-profit childcare centers, may be able to self-certify as well. For more information about self-certification, please contact your school or child care center's business office or the Indiana State Board of Accounts.



# Determining Your Method

Determine your method based on the projected amount you will spend. Keep in mind, if your expenses exceed the original projection, you might need to change your procurement method.

## Informal: Micro-Purchase Method

The micro-purchase method is the most simple method and does not require any bids. This method is the perfect way to get started with local procurement as you will likely not exceed this threshold (a maximum of \$10,000 or \$50,000 if qualified to self-certify) at the beginning of your journey. You simply have to find a producer to work with, determine a price, and begin purchasing from that producer.

- If you choose to self certified, you must contact your school business office to get approved as this change impacts all school purchases and will be reviewed by State Board of Accounts.

### Micro-Purchase Method

1  
Choose a producer or distributor that you want to work with

2  
Agree on a price for products, purchase product, retain all documentation



# Richland Bean Blossom School Corporation

In October 2023, Richland Bean Blossom School Corporation Edgewood Schools celebrated Food Day featuring a local protein, King David's Hot Dogs from Piazza Produce. It was well received for sure!! Another protein item we serve often is a smoothie for breakfast at our secondary schools. We use a local yogurt ordered from Prairie Farms. We are hopeful to receive a grant in the future to help us build our Farm to School efforts and provide more local protein to our cafeterias by purchasing beef from our agriculture students to serve fresh beef burgers to our students!

What procurement method do you use?

- For one-off menu items such as the Food Day hot dogs, with the threshold being well under \$10,000, we used micro-purchasing.
- Protein-based dairy product vendors are selected through our Co-op through an official bid process.

Vickie Coffey , Director of Food & Nutrition Services



# Informal: Small Purchase Method

The small purchase method (\$150,000 maximum threshold) is also a pretty simple way of procuring local food, however, it does require three quotes. You must develop the specifications you need, obtain three quotes from three producers and then determine the best producer based on the evaluation criteria you determine. You get to decide what evaluation criteria is used (i.e. price, location, quality, delivery, etc.) and assign points based on your preference. However, price must be one of the evaluation criteria, and it must be the highest weighted criteria. Examples of evaluation/scoring criteria can be found on the IDOE website [here](#), or in the [Indiana Grown for Schools Procurement Toolkit](#) in appendix E.

## Small Purchase Method

1  
Develop specifications, terms, and conditions for your products

2  
Obtain quotes from three vendors

3  
Evaluate quotes

4  
Choose the vendor that will best meet your needs

5  
Make purchase and retain all documents

\*Price is the only required criteria and it must be awarded the most amount of points.



# New Albany Floyd County Schools

New Albany Floyd County Schools understands the importance of supporting local farmers and providing our students with high quality proteins that are sustainable, nutritious, and enthusiastically received by our students. We are lucky to have a partnership with 3D Valley Farms where we currently purchase grass-fed beef & pork that are raised 100% humanely (no antibiotics, hormones or chemicals of any kind). We employ the informal small purchase procurement method with a purchasing threshold of under \$150,000.00 and utilize a portion of our supply chain assistance funds to support the program.

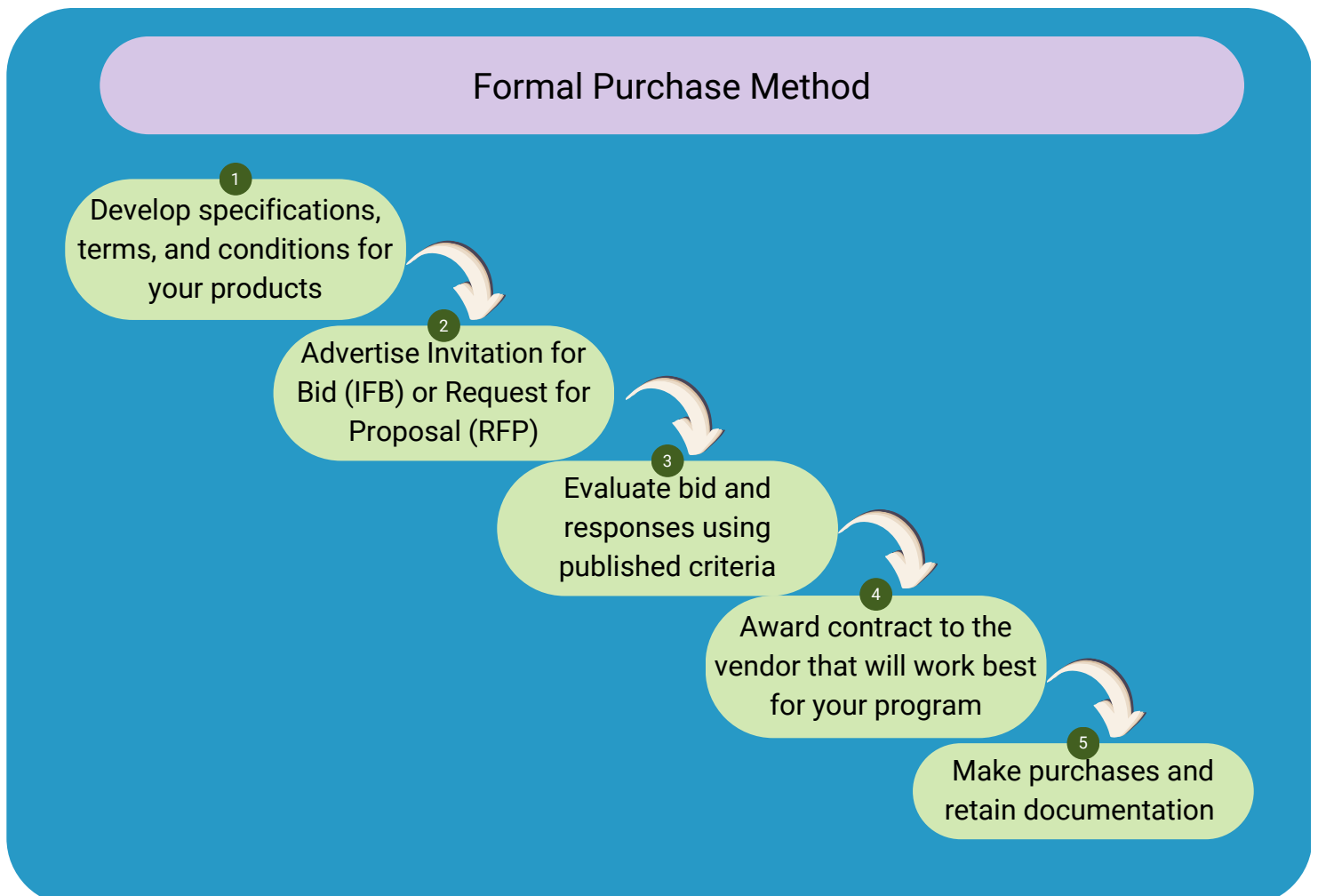
Leslie Beach, Director of Food & Nutrition Services

Learn more about 3D Valley Farms at  
<https://3dvalleyfarm.com/>



# Formal: Large Purchase Method

The large purchase method (for expenses exceeding \$150,000) is the last form of purchasing and is the most in-depth process. This method requires you to publicize your solicitation either through an Invitation for Bid (IFB) or a Request for Proposal (RFP). More information on IFBs and RFPs can be found on the USDA [Procuring Local Foods](#) web page and in the Procuring Local Foods for Child Nutrition Programs Guide.



# Crediting Meat/Meat Alternates

In order to serve students Meat/Meat Alternates (M/MA) that you procure locally, you will want to make sure that the item is creditable and served in the correct portion size to be counted as a component of the reimbursable meal.

1. M/MA are credited by weight, not volume.
2. M/MA are measured in ounce equivalents (oz eq) where an ounce equivalent of M/MA equals 1 ounce of edible portion of lean meat without the bone.
3. The actual portion size of the M/MA will most likely not equal the creditable portion size. For example, a 2.6 ounce hamburger patty cooked might credit as a 2 oz eq M/MA.

For M/MA, you can determine if the menu item is creditable and meets the meal pattern by using the USDA Food Buying Guide, Child Nutrition (CN) labels, product formulation statements, or USDA Foods in Schools Production Information Sheets. It is not likely that you will have a CN label or product formulation statement for a local protein so the Food Buying Guide will be your best choice for crediting.

# Using the Food Buying Guide To Determine Yield of your Local Protein

The Food Buying Guide (FBG) is an essential resource for all child nutrition programs because it helps with purchasing the correct quantity of foods and determining each food's contribution toward the meal pattern requirements. FBG is available as an [interactive web-based tool](#), [mobile app](#), and [downloadable PDF](#). By creating a free account, you can access many helpful tools. Training resources for the Food Buying Guide can be found [here](#).

Yield refers to the amount of product that is leftover after processing. Meat will have a different final yield than its raw state. Let's look at a few examples using the Food Buying Guide.

# Example #1

A school is looking to purchase ground beef from a local farmer to make taco meat. The farmer can provide 75% lean, 25% fat raw, fresh ground beef. How much raw product should they purchase to provide a 2 ounce cooked portion to 100 students?

1. Find the specific food item you are going to purchase in the Food Buying Guide. Look closely at the ingredient specification in the Food As Purchased column (column 1). Here we have chosen the Beef, Ground, fresh or frozen with no more than 26% fat.

## Section 1 - Meats/Meat Alternates

1. Food As Purchased, AP	2. Purchase Unit	3. Servings per Purchase Unit, EP	4. Serving Size per Meal Contribution	5. Purchase Units for 100 Servings	6. Additional Information
<b>BEEF, GROUND, fresh or frozen</b>					
Beef, Ground, fresh or frozen <sup>9,10</sup> <i>no more than 26% fat, (Like IMPS #136)</i>	Pound	11.50	1 oz cooked lean meat	8.70	1 lb AP = 0.72 lb cooked, drained, lean meat
	Pound	7.68	1-1/2 oz cooked lean meat	13.10	1 lb AP = 0.72 lb cooked, drained, lean meat

2. This information tells us that 1 pound of beef, ground, fresh or frozen with no more than 26% fat will provide 11.5 one ounce cooked portions (column 3). In order to provide 100 servings of a one ounce cooked portion you would need 8.7 pounds of this product (column 5).
3. For the school to provide a two ounce cooked portion to 100 students, they would need to purchase twice the amount required for a one ounce portion which would be 17.4 pounds.



# Example #2

A school would like to purchase a pork shoulder from a local farmer to add a barbeque pulled pork sandwich to their menu. The farmer has provided that the cut of the pork shoulder is Boston Butt without a bone with a minimal amount of fat, approximately a ¼ inch. How much raw product should they purchase to provide a 2 ounce cooked portion to 100 students?

1. Find the specific food item you are going to purchase in the Food Buying Guide. Look closely at the ingredient specification in the Food As Purchased column (column 1). Based on the farmer's specifications we have chosen the Pork Shoulder, Boston Butt, fresh or frozen, without bone, 1/4-inch trim.

## Section 1 - Meats/Meat Alternates

1. Food As Purchased, AP	2. Purchase Unit	3. Servings per Purchase Unit, EP	4. Serving Size per Meal Contribution	5. Purchase Units for 100 Servings	6. Additional Information
<b>PORK SHOULDER, BOSTON BUTT, fresh or frozen</b>					
Pork Shoulder, Boston Butt, fresh or frozen <i>Without bone, 1/4-inch trim, (Like IMPS #406A)</i>	Pound	9.60	1 oz cooked lean meat	10.50	1 lb AP = 0.60 lb cooked lean meat
	Pound	6.40	1-1/2 oz cooked lean meat	15.70	1 lb AP = 0.60 lb cooked lean meat

2. This information tells us that 1 pound of this pork shoulder product will provide 9.6 one ounce cooked portions (column 3). In order to provide 100 servings of a one ounce cooked portion you would need 10.5 pounds of this product (column 5).
3. For the school to provide a two ounce cooked portion to 100 students, they would need to purchase twice the amount of a one ounce portion which would be 21 pounds.
4. If the school plans to serve a two ounce cooked portion to 200 students, they should purchase 42 pounds of pork shoulder from the farmer.

# Standardized Recipes

Creating a standardized recipe with your local protein will be needed if the menu item using the meat/meat alternate contains two or more ingredients and preparation is involved. The USDA defines a standardized recipe as “one that has been tried, adapted, and retried at least three times and has been found to produce the same good results and yield every time when the exact procedures are used with the same type of equipment and the same quantity and quality of ingredients.”

Standardized recipes provide consistency in menu items to meet student expectations, ensure that crediting and accurate dietary specifications are met each time, and help with food cost control and efficient purchasing procedures.

The following information should be included in a standardized recipes:

1. Recipe Title and Description - Choose a specific and appealing title to describe your recipe.
2. Recipe Category - Is the recipe an entrée or side dish?
3. Ingredients - List all that are used in the recipe by product name, type and preparation technique.
4. Weight or Volume - State the quantity of each ingredient in weight or volume.
5. Preparation Time and Directions - Provide step by step information on how to prepare the recipe and how much time it will take.
6. Cooking Time and Temperature - By including the time and internal temperature, you will be sure to keep food safe.
7. Serving Size and Recipe Yield - Make sure to include the size of the individual serving the recipe will provide as well as the total amount the recipe will prepare.
8. Equipment and Utensil Needs - Recipes should be standardized to the specific equipment and utensils used at the site.
9. Crediting Statement and Nutrient Analysis - Identify how a food counts towards the required meal components for reimbursement and meets nutrient parameters per USDA regulations.
10. Food Safety Guidelines - Have the Critical Control Points been determined for each step in the recipe?

More information on standardized recipes can be found in the [USDA Recipe Standardization Guide for School Nutrition Program](#).

# Nutrient Analysis

Nutrient analysis involves determining the nutrition content of the local protein that will be put on the menu in order to be compliant with the nutrient parameters and regulatory requirements set by the USDA in school meals. Calories, saturated fat and sodium must be known in order to meet the daily amount based on the average for a five day week.

Sources for nutrient data would include nutrition facts labels on product packaging, Child Nutrition (CN) labels, and production formulation or specifications sheets provided by the manufacturer. However, these forms of nutrient data may not be available on a local protein. Therefore, a reliable source for nutrient data could come from the following sources:

1. USDA-approved nutrient analysis software, <https://www.fns.usda.gov/tn/usda-approved-nutrient-analysis-software>
2. USDA Foods in Schools Product Information Sheets, <https://www.fns.usda.gov/usda-fis/usda-foods-product-information-sheets>
3. USDA Food Data Central, <https://fdc.nal.usda.gov/>

Remember that nutrient analysis should be calculated based on the finished food product as it will be consumed by the student. When analyzing a recipe that includes raw ingredients that will be cooked or further prepared, use the yield factor method by taking into account the yield data from USDA's Food Buying Guide to convert a raw ingredient to the cooked amount.

More information can be found on nutrient analysis in the USDA manual, [Nutrient Analysis Protocols](#).

Are you looking for some new recipe ideas?

Try these school nutrition recipe resources for menu planning.

Institute of Child Nutrition Recipe Box, <https://theicn.org/cnrb/>

Healthy School Recipes, <https://healthyschoolrecipes.com/>

The Lunch Box, <https://www.thelunchbox.org/>

Team Nutrition, <https://www.fns.usda.gov/tn/team-nutrition-recipes>

## Frequently Asked Questions

**Question: Are there any specific rules that apply JUST to local procurement?**

Answer : No, all rules are the same as with any procurement for USDA Child Nutrition Programs.

**Question: When purchasing under the micro-purchase threshold, can you purchase multiple times from the same farmer/producer?**

Answer: Yes! This ruling was recently changed and not updated on all documents. You can purchase from the same farmer or vendor multiple times under the micro-purchase threshold. If total purchases from one producer exceeds your schools' micro-purchase threshold in a given year, you must begin following the small purchase threshold guidelines.

**Question: How do I know what my micro purchase threshold is?**

Answer: Review your Procurement Plan to identify your micro-purchase threshold. If you are at the standard \$10,000 maximum and you would like to increase your micro-purchase threshold, please contact your business office as this change is done for the entire school corporation.

- Note: The Micro Purchase - Self Certified Checkbox is under the Micro-purchase section of the Procurement Plan. An example of your procurement plan can be found on the [IDOE Procurement Page](#) under the Forms, Templates, and Examples drop down.

**Question: What types of purchases fit in the micro-purchase thresholds?**

Answer: Purchases from the same vendor in the same financial year.

- Example: If you make purchases from Wildwood Farm one time each month, for the duration of the year, and the sum of those purchases over the entire year is under your micro-purchase threshold, you can purchase with no further quotes.

**Question: If a school has not "self-certified" their threshold to \$50,000, can they revise and resubmit their procurement plan mid-year?**

Answer: Yes

**Question: Are schools allowed to purchase food from an auction?**

Answer: Yes, this would be the same as going to an actual farm. Please refer to the Food Safety Factors.

**Question: Could a school pre-purchase food from a farm?**

Answer: Yes, a school could pay for 50 lbs of ground beef in May and then receive the beef in the fall.

**Question: If a school wants to purchase from their own school garden/animal production program, would the school need to create an LLC for their “company”?**

Answer: No

**Question: How would a school document a purchase from the school garden or farm?**

Answer: There is no one set way to do this. The following is one possible suggestion:

- School Garden/Farm creates an invoice.
- They give the invoice to the School Foodservice Authority (SFA).
- SFA pays the invoice to whatever account the school garden/farm’s money is kept in.

**Question: Do I need a product formulation statement or Child Nutrition label for raw, unprocessed products?**

Answer: No. You only need product formulation statements or CN labels for products that contain more than one ingredient.