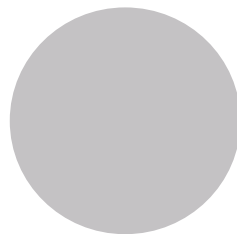
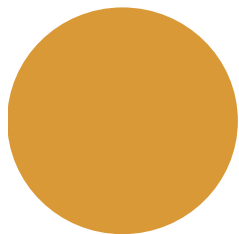
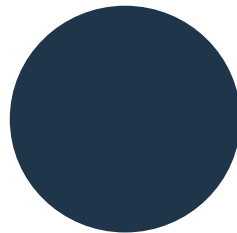
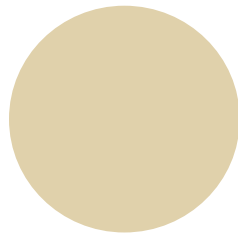
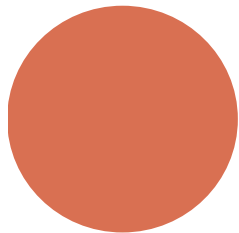
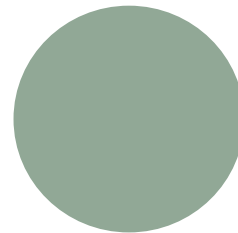
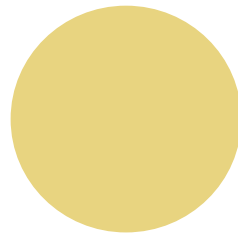
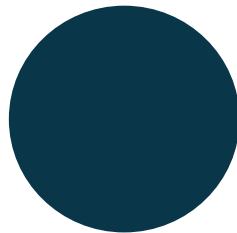


# LOCAL SUSTAINABLE FOOD PROCUREMENT

For Municipalities and the Broader Public Sector

## -WORKBOOK-





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The Local Sustainable Procurement Workbook is designed specifically to assist staff at municipalities and Broader Public Sector institutions in Ontario in their work to advance local, sustainable procurement policies and practices across the province. This workbook is a compilation of tools and examples from across North America selected to provide assistance with all stages of food procurement. The full reference to the original source can be found at the end of each tool. In most cases, the workbook items appear in their original formats and Sustain Ontario assumes no credit for the creation of the original documents. The geographic origin of each tool is also referenced in the table of contents to acknowledge the contributions from sustainable procurement leaders. This workbook is designed to accompany the Local, Sustainable Procurement Guide, written by Sustain Ontario, which provides a policy analysis and other tools that may assist municipalities and institutions with their procurement processes.

This workbook is following the three stages of procurement outlined by Megens, Roy, Murray, and Harry Cummings and Associates. These three stages - **Planning, Implementation, and Evaluation** - are explained in detail below. The selected tools and examples appear in sequential order based on these procurement stages.

## PLANNING

- creating a local, sustainable food procurement strategy
- building and auditing seasonal menus
- forecasting and budgeting

## IMPLEMENTATION

- finding and purchasing local food
- working with producers and distributors

## EVALUATION

- assessing meals and menus
- conducting a local food audit

## STEPS TO LOCAL FOOD PURCHASING

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### Before You Start the Procurement Process

1. **Budgeting:** Calculate revenues, determine percentage of revenue to be spent on food, and identify maximum food cost per meal available.
2. **Forecasting:** Identify the products and quantities you will be purchasing, and estimate the total cost of the purchase.
3. Depending on the dollar amount of the purchase, determine whether to use a formal or informal procurement method.
4. Plan your procurement procedure, ensuring compliance with Federal, State and school district requirements.
5. Decide how you wish to define "local."
6. As relevant, determine the criteria and method of evaluation for how you will apply a geographic preference.
7. Where appropriate, incorporate these decisions into school district policy to guide food purchases.

### Putting Together the Procurement

1. Clearly communicate your intent to purchase local products and explain how you define local. As relevant, apply a geographic preference to your solicitations.
2. Clearly define and communicate the evaluation criteria that will be used to select successful vendors, regardless of which method you use.
3. Identify vendor qualifications that meet your needs.
4. Write specifications to clearly identify the products you want, the level of processing you require, and any other quality, customer service or performance criteria.
5. State preferences and how they will be weighted in the evaluation process.
6. Develop and commit to a plan for reviewing and selecting the successful bid, proposal or quote.

## Implementing the Procurement Process

1. Publicize the procurement opportunity to ensure adequate competition and maximize the likelihood of reaching qualified vendors who can supply food from your geographic preference area.
2. Fairly evaluate based on the vendor qualifications, specifications and preferences in your procurement request, and award the contract.
3. Execute a contract that matches your specifications and preferences from the procurement request.
4. Manage the procurement. Monitor and keep documentation on service, product quality, price and compliance with the contract.

**Adapted from** : Conell, C. (2014). *Procuring Local Foods for Child Nutrition Programs*. [Found Online](#). **Original source**: Kovacs, T. (2012). *A School's Guide to Purchasing Washington Grown Food*. [Accessible Online](#).

# LOCAL FOOD PROCUREMENT ACTION PLAN

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- **Make the decision to develop a local food program**
  - Make an institutional commitment to support a local food system
  - Identify demand for local products through a survey or petition
  
- **Create faculty, staff, and student committee or the equivalent at your institution to discuss a local food program strategy**
  - Define “local”
  - Determine which products are most important to buy locally
  - Determine food safety, consistency, quality, and quantity concerns you may have
  - Consider food safety and risk management concerns section
  - Determine short- and long-term goals
  - Determine what food served at your institution is already local
  
- **Determine local food program budget**
  - Figure out how food budget will be expanded or amended
    - Determine who should be involved in the budget process
    - Determine budgetary details like acceptable price differential for local products
  - Locate potential local, state, and national funding opportunities



- **Plan your menu to begin incorporating local food**
  - Consider seasonality of products
  - Determine quantity of products needed
  
- **Find local food producers or distributors in the area considered “local”**
  - Contact a local food-related organization in your area to see if they have list of local food producers or information on upcoming networking events to meet local food producers
  - Attend local food-related events where local food producers may be in attendance like networking events, farmer’s markets, or producer meetings
  - Find out whether or not there is a local food producer cooperative or wholesaler in the area that can supply many different local products, especially your current food distributor if they will work with local food producers

- **Establish a close business relationship with local food producers and distributors**
  - Discuss all aspects of a potential business partnership
  - Have producers provide food samples, tours of facility, or copies of certifications
  - If you have an agreement with a contracted food distributor, determine if there is a process for a producer to become an approved supplier
  
- **Start purchasing small amounts of local food items**
  - Negotiate price details
  - Work out packaging details, payment options, and delivery schedule with the producer
  - Make a verbal agreement or have the producer sign letter of intent or contract, if necessary
  
- **Inform your consumer about local food purchases**
  - Inform consumer about the benefits of supporting local food systems
  - Advertise the producer's background, practices, and location of where products are raised, grown, or processed

- **Maintain Relationship with Producer**
  - Communication with producers before, during, and after growing seasons or the time when processing occurs
  - Commit to periodic on-site visits to producers' facilities or review certification documents to learn about the products and ensure food safety and quality
  
- **Expand local food program as capabilities allow**
  - Consider food storage and preservation methods
  - Consider educational and curriculum opportunities
  - Consider increasing the quantity of local food purchased over time

*Adapted from* : Iowa Initiative for Sustainable Communities Project . (2012). Institutional Local Food Program Action Plan and Guide. [Accessible Online](#).

# LOS ANGELES GOOD FOOD PURCHASING PROGRAM'S EVALUATION CRITERIA

## An Overview of Good Food Values

Procurement suggestions will focus on sourcing products that align with these Good Food principles:

### LOCAL ECONOMIES (LOCAL FOOD)

- Use local, seasonally available ingredients from community supported, small and medium sized farms and food processing facilities, to maintain local economies, create jobs, prevent sprawl, preserve farmlands, provide fresher food, and minimize transport and storage. If local ingredients are not available, use regional or at a minimum, domestic, ingredients.

### ENVIRONMENTAL SUSTAINABILITY (ENVIRONMENTALLY SUSTAINABLE FOOD)

- Specify food from farming systems that minimize harm to the environment:, such as certified organic farms, farms offering high bio-diversity of crop yield, farms actively reducing risk created through pesticide use, and soil enrichment and water conservation programs.
- Avoid food products with supplemental growth hormones and non-therapeutic antibiotics and Genetic Modification (GMO) of crops, livestock, and livestock feed.
- Minimize foods of animal origin (meat, dairy products, and eggs), as livestock farming is one of the most significant contributors to climate change.
- Exclude fish species identified as most 'at risk' by the Marine Conservation Society and Monterey Bay Aquarium's Seafood Watch and give preference to fish derived from sustainable sources.
- Purchase lower-grade (less than retail quality) produce for use in prepared dishes to allow more complete use of farm produce, to reduce waste, and to reduce costs.
- Minimize bottled water sales and instead serve plain or filtered tap water in reusable jugs or bottles, to minimize transport and packaging waste.

### VALUED WORKFORCE (FAIR FOOD)

- Choose food products that ensure safe and healthy working conditions, fair compensation, and a voice at work for all food chain workers and producers from production to consumption.
- Choose food and drink products that ensure a fair deal for producers and workers in developing nations and economies.

### ANIMAL WELFARE (HUMANE FOOD)

- If animal products are a featured menu item, ensure that meat, dairy products, and eggs are produced using high verifiable animal welfare standards which consumers would consider to be significantly higher than standard industry practices.

### NUTRITION (HEALTHY FOOD)

- Promote health and well-being by offering generous portions of vegetables, fruit, and whole grains while reducing salt, added sugars, fats, oils, and red meat consumption, and eliminating artificial additives.

Improving equity, affordability, accessibility, and consumption of high quality culturally relevant Good Food in all communities is central to our focus on advancing Good Food purchasing practices.

Example on next page

**Adapted from :** Los Angeles Food Policy Council (2012). *Good Food Purchasing Guidelines for Food Service Institutions*. [Accessible Online](#).

## Example of the Los Angeles Good Food Purchasing Program

Figure 1.

	Meals Served	Local Economies	Environmental Sustainability
<b>City of LA – Department of Aging (Morrison)</b>	4,500 meals per day	Significant percentage of dairy purchases are from within 200 miles	<ul style="list-style-type: none"> <li>Majority of seafood purchases qualify as “Green” and “Yellow” under the Monterey Bay Aquarium’s Seafood Watch Guide</li> <li>Significant percentage of dairy purchases are hormone-free.</li> </ul>
<b>City of LA – Convention Center (Aramark)</b>	748,000 year (average: 2,050/day)	Exceeds baseline benchmark in sourcing local food items.	<ul style="list-style-type: none"> <li>Purchases sustainably caught and/or farmed fish through partnership with Monterey Bay Seafood Watch</li> <li>Donates excess food to LA Regional Food Bank, in compliance with 2010 LA City Council action</li> </ul>
<b>City of LA – Department of Water and Power (Sodexo)</b>	500 meals per day	Sourcing locally grown food where possible	<ul style="list-style-type: none"> <li>Encourages employees to participate in “Meatless Mondays” campaign</li> <li>Donates excess food to LA Regional Food Bank required through contract, in compliance with a 2010 LA City Council action</li> </ul>
<b>LA Unified School District</b>	650,000 meals per day	<ul style="list-style-type: none"> <li>Since committing to local sourcing in 2011, at least \$13 million in healthy produce purchases has been redirected to local farmers, processors, warehouses, distributors and workers.</li> <li>Over 95 % of LAUSD’s dairy products are sourced locally.</li> </ul>	<ul style="list-style-type: none"> <li>Purchases only hormone-free milk</li> <li>Implemented “Meatless Mondays”</li> <li>Distributor, Gold Star, established a partnership with a supplier to produce 100% sustainable, California-grown wheat flour for all buns produced in the State beginning in 2014.</li> </ul>
<b>Guckenheimer Google LA &amp; Roll Global</b>	Information not available	Exceeds baseline benchmark in sourcing local food items by twice the target amount listed in the GFPP guidelines	<ul style="list-style-type: none"> <li>Majority of dairy purchases are organic and remaining dairy products are hormone-free.</li> <li>Over 75% of seafood ingredients are rated green, according to Monterey Bay Seafood Watch Guide</li> </ul>

	Valued Workforce	Animal Welfare	Nutrition
<b>City of LA – Department of Aging (Morrison)</b>			<ul style="list-style-type: none"> <li>• Limits added sodium, sugar, and fat</li> <li>• Does not use deep-frying as a cooking method</li> <li>• Has established an onsite wellness program with nutrition education.</li> </ul>
<b>City of LA – Convention Center (Aramark)</b>	Aramark employees at the Convention Center represented by UNITE HERE.		<ul style="list-style-type: none"> <li>* Re-arranged retail food outlets to promote healthy options, replacing high impulse items, e.g. candy and snacks with fresh fruit baskets near cash registers.</li> <li>* Sales of fruit and had no impact on overall sales.</li> </ul>
<b>City of LA – Department of Water and Power (Sodexo)</b>	Sodexo workers at DWP's cafeteria are represented by UNITE HERE.		<ul style="list-style-type: none"> <li>• Accepts EBT as payment</li> <li>• Provides menu labeling as part of "Your Health, Your Way" campaign</li> <li>• Has low-fat, low-sodium, and vegetarian options available at all meals</li> </ul>
<b>LA Unified School District</b>	<ul style="list-style-type: none"> <li>• 3,300 cafeteria workers in school cafeterias represented by SEIU Local 99.</li> <li>• As the District begins to prioritize scratch cooking, cafeteria workers will have the opportunity to reintroduce culinary skills into their kitchens</li> </ul>		<ul style="list-style-type: none"> <li>• At the forefront of the school food movement for over a decade through initiatives such as the district's healthy beverage and obesity resolutions and elimination of sugar-flavored milk in 2010.</li> <li>• First school district in the US to implement the 2009 Institute of Medicine's nutritional guidelines, adopted with the introduction of a new menu in 2011.</li> </ul>
<b>Guckenheimer Google LA &amp; Roll Global</b>	Amount of food purchased reflecting Valued Workforce criteria at Levels 2 and 3 was three times greater than the target amount listed in GFPP Guidelines.	Met baseline in Animal Welfare category for Google LA cafeteria, with a significant percentage of meat and dairy purchases coming from Level 3 sources (Certified Humane eggs, Global Animal Partnership for meats & poultry).	<ul style="list-style-type: none"> <li>• Over 25% of food budget is spent on fruits and vegetables</li> <li>• Healthy beverages are placed at eye level. Sugary drinks are hidden behind frosted glass on the bottom shelf</li> <li>• Offer daily vegetarian and vegan options</li> <li>• Google employs "Core Performance" as an onsite nutrition and wellness provider.</li> </ul>

**Adapted from :** Los Angeles Food Policy Council (2014). *The Good Food Purchasing Pledge A Case Study Evaluation & Year One Progress Update.* [Accessible Online.](#)

# GETTING STARTED WORKSHEET

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1. Who are your customers and what is important to them.

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2. What do you see as your organization's strengths in moving forward with the commitment to local food?

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3. What do you see as your organization's weaknesses in moving forward with the commitment to local food?

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4. What do you see that might hold this project back?

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5. What are the opportunities of making the local food commitment in your organization?

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## Food Service Type and Volume

1. What kind of food are you currently serving? Check all that apply.

<input type="checkbox"/>	Primarily fresh	<input type="checkbox"/>	Heat and serve
<input type="checkbox"/>	Primarily frozen	<input type="checkbox"/>	Semi-prepared
<input type="checkbox"/>	Primarily scratch cooking	<input type="checkbox"/>	Combination of _____ and _____
<input type="checkbox"/>	Primarily packaged	<input type="checkbox"/>	Other

2. Numbers served:

Breakfasts served per day: \_\_\_\_\_

Lunches served per day? \_\_\_\_\_

Dinners served per day? \_\_\_\_\_

Snacks served per day? \_\_\_\_\_

Number of sites where cooking occurs: \_\_\_\_\_

Number of sites where food is served: \_\_\_\_\_

## Current Budget

1. What is your current annual food budget?

\$ \_\_\_\_\_/year

2. On average how many customers do you feed:

per day: \_\_\_\_\_ per month: \_\_\_\_\_

3. What is your food budget per customer per day?

\$ \_\_\_\_\_ /customer/day

4. This per day budget includes: (totals from above)

\_\_\_\_\_ (#) snacks \_\_\_\_\_ (#) meals

5. What is a typical order for fresh produce in dollars or volume by month or week?

\$ \_\_\_\_\_/week

\$ \_\_\_\_\_/month

\_\_\_\_\_ (volume)/week

\_\_\_\_\_ (volume)/month



## Logistics - ordering, payment, delivery

1. What are your current procurement procedures? Will they need to be altered to incorporate purchasing more local food?

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2. Do you have current contracts with distributors? When are they up for review?

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3. How many deliveries are made per week? What days of the week and at what times?

\_\_\_\_\_ times/week     Mon  Tue  Wed  Thu  Fri

4. How do you prefer to place orders?

Telephone     Email     Fax

5. How often do you place orders?

Monthly     Weekly     A specific day of the week

6. What are your payment procedures? How long will it take for your organization to receive the invoice and make payment?

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## Why do you want to purchase local food

What do you see as the advantages of offering local foods in your organization?

- |  |  |
|--|--|
| <input type="checkbox"/> Access to fresher foods                                 | <input type="checkbox"/> Building partnerships between your organization and the community |
| <input type="checkbox"/> Higher quality of food                                  | <input type="checkbox"/> Lower transportation costs  |
| <input type="checkbox"/> Lower costs of food                                     | <input type="checkbox"/> Less use of pesticides, hormones, etc.                            |
| <input type="checkbox"/> Ability to purchase special varieties and types of food | <input type="checkbox"/> Positive public relations   |
| <input type="checkbox"/> Promoting greater consumption of fruits and vegetables  | <input type="checkbox"/> Fulfilling customer requests for local food                       |
| <input type="checkbox"/> Knowing the product source                              | <input type="checkbox"/> Other: _____  |
| <input type="checkbox"/> Supporting local economy and local farms                | _____  |

**Adapted from:** *Guelph Wellington Local Food. (2015). The Road to Local Food: Increasing Local Food in Broader Public Sector (BPS) Organizations – Guelph Community Health Centre. [Accessible Online](#).*

# LOCAL FOOD DEFINITIONS

## The Local Food Act Definition of Local <sup>1</sup>

“local food” means,

- (a) food produced or harvested in Ontario, including forest or freshwater food, and
- (b) subject to any limitations in the regulations, food and beverages made in Ontario if they include ingredients produced or harvested in Ontario; (“aliments locaux”)

## Concentric Circle (tiered) Definition of Local <sup>2</sup>

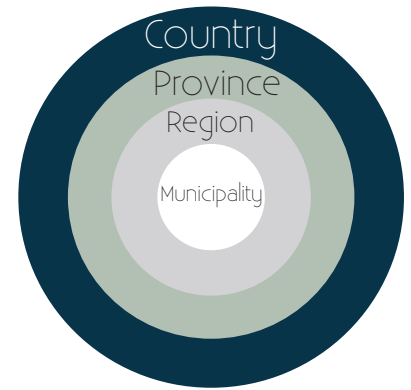
It may be practical for local food procurement to be thought of in a concentric circle model (or tiered approach) that starts with the municipality, then region, then province, then country. This definition allows certain foods to be bought within the relevant scale for that municipality, or season.

Example of two-tiered approach:

This municipality defines “locally grown products” eligible for this geographic preference at two levels.

These levels are:

1. Grown in \_\_\_\_\_, \_\_\_\_\_, or \_\_\_\_\_ region/country
2. Grown in \_\_\_\_\_ province



## FoodLand Ontario Local Food Definitions

Consumer and industry approved definitions of Ontario food products

### Ontario beef

Ontario beef will be born, raised, slaughtered and further processed in an approved facility in Ontario. When there are not enough calves born in Ontario to meet the demand for beef, calves may be sourced from within Canada. This beef will be raised, slaughtered and further processed in Ontario. This would return more than 80 per cent of the direct costs of production to Ontario’s farmers and economy.

### Ontario cheese

More than 90% of the milk in Ontario cheese is produced on Ontario dairy farms. Up to 10% of the milk used for processing in Ontario can be sourced from within Canada. The curds and whey must be produced in Ontario from Ontario dairy inputs. Any identified secondary ingredients need to be grown and produced in Ontario (e.g. strawberry cream cheese).

### Ontario chicken

Ontario chicken will be hatched from eggs laid in Ontario or from newly hatched chicks which may be sourced from within Canada or the United States. These chickens will then be raised, slaughtered and processed in Ontario.

1. **Adapted from** : Ontario’s Local Food Act, Bill 36. (2013). [Accessible Online](#).

2. **Adapted from** : Conell, C. (2014). *Procuring Local Foods for Child Nutrition Programs*. [Accessible Online](#).

### **Ontario dairy products (yogurt, sour cream etc. – excludes milk and cheese)**

More than 90% of the milk in Ontario dairy products must be produced on Ontario dairy farms. Up to 10% of the milk used for processing in Ontario can be sourced from within Canada. Any identified secondary ingredients need to be grown and produced in Ontario (e.g. peach yogurt).

### **Ontario eggs**

Ontario eggs must be laid on egg farms in Ontario.

### **Ontario fruit**

Ontario fruit must be grown in Ontario.

### **Ontario hard wheat flour**

A majority (over 80%) of the final volume of the product must be grown in Ontario and 100% of the wheat must be milled in Ontario.

### **Ontario honey**

100% of the product must be produced, extracted and packaged in Ontario.

### **Ontario lamb**

Must be born, raised, slaughtered and processed in Ontario.

### **Ontario maple syrup**

100% of the product must be collected, processed and packaged in Ontario.

### **Ontario milk**

More than 90% of the milk processed in Ontario is sourced from Ontario dairy farms. Up to 10% of the milk used for processing in Ontario can be sourced from within Canada. Any identified secondary ingredients need to be grown and produced in Ontario.

### **Ontario pork**

Must be born, raised, slaughtered and processed in Ontario.

### **Ontario processed food products**

Ontario processed food products must be made in Ontario from a majority of Ontario ingredients. More than 80% of the total direct costs of production must return to Ontario. Primary agricultural ingredients will meet the individual Ontario foods definition.

Example: “Ontario beef and vegetable soup” – the primary ingredients (in this case beef and vegetables), would need to meet the individual Ontario food definitions.

Ontario soft wheat flour (cake and pastry flour)

Due to extensive production of soft wheat in the province, 100% of the Ontario soft wheat needs to be grown and milled in Ontario

### **Ontario turkey**

Ontario turkey will be hatched from eggs laid in Ontario or from newly hatched poults which may be sourced from within Canada or the United States. These poults will then be raised, slaughtered and processed in Ontario.

### **Ontario vegetables**

Ontario vegetables must be grown in Ontario.

**Adapted from** : FoodLand Ontario. Ontario Food Definitions. [Accessible Online.](#)

# ONTARIO PRODUCT CHART

## Vegetables

The following chart shows products available in Ontario. Use the chart to see what products you are currently buying. If you are currently buying them non-local is this a product you would consider purchasing locally.

Item	Processed (Frozen, canned, etc.)	Unprocessed (Fresh)	Currently Local	Currently Non-Local	Priority to switch to Local
Artichoke	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asian Vegetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asparagus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beans (Green/Wax)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bok Choy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broccoli	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brussels Sprouts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cabbage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carrots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cauliflower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Celery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cucumber (Field)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cucumber (Greenhouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eggplant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garlic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leeks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lettuce (Assorted)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lettuce (Greenhouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mushrooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onions (Cooking)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onions (Green)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onions (Red)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parsnips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peas (Green)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peas (Snow)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peppers (Field)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Peppers (Greenhouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Potatoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Radishes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rapini	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rutabaga	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spinach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sprouts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Squash	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sweet Potatoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Item	Processed (Frozen, canned, etc.)	Unprocessed (Fresh)	Currently Local	Currently Non-Local	Priority to switch to Local
Tomatoes (Field)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tomatoes (Greenhouse)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zucchini	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Fruit

Item	Processed (Frozen, canned, etc.)	Unprocessed (Fresh)	Currently Local	Currently Non-Local	Priority to switch to Local
Apples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blueberries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cherries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currants (Red/Black)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grapes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Melon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pears	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Raspberries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rhubarb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strawberries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strawberries (Day Neutral)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Watermelon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Other

Item	Currently Local	Currently Non-Local	Priority to switch to Local
Eggs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meats	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Honey	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maple Syrup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Milk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cheese	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yogurt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# SOUTHERN ONTARIO SEASONAL AVAILABILITY GUIDE

Vegetables	In Season							Harvest Time				
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Artichoke												
Asian Vegetables												
Asparagus												
Beans (Green/Wax)												
Beets												
Bok Choy												
Broccoli												
Brussels Sprouts												
Cabbage												
Carrots												
Cauliflower												
Celery												
Corn												
Cucumber (Field)												
Cucumber (Greenhouse)												
Eggplant												
Garlic												
Leeks												
Lettuce (Assorted)												
Lettuce (Greenhouse)												
Mushrooms												
Onions (Cooking)												
Onions (Green)												
Onions (Red)												
Parsnips												
Peas (Green)												
Peas (Snow)												
Peppers (Field)												
Peppers (Greenhouse)												
Potatoes												
Radishes												
Rapini												
Rutabaga												
Spinach												
Sprouts												
Squash												
Sweet Potatoes												
Tomatoes (Field)												
Tomatoes (Greenhouse)												
Zucchini												

<b>Fruits</b>	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Apples												
Blueberries												
Cherries												
Currants (Red/Black)												
Grapes												
Melon												
Pears												
Plums												
Raspberries												
Rhubarb												
Strawberries												
Strawberries (Day Neutral)												
Watermelon												

<b>Other</b>	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Eggs												
Meats												
Processed Foods												
Honey												
Maple Syrup												
Milk Products												

**Adapted from** : Guelph Wellington Local Food. (2015). *The Road to Local Food: Increasing Local Food in Broader Public Sector (BPS) Organizations – Guelph Community Health Centre.* [Accessible Online.](#)

# NORTHERN ONTARIO SEASONAL AVAILABILITY GUIDE

	May	June	July	Aug	Sept	Oct	Nov-Feb
Fiddleheads							
Greenhouse Herbs							
Greenhouse Salad Greens							
Jerusalem Artichokes (Sun chokes)							
Over-wintered Parsnips							
Rhubarb							
Wild Salad Greens							
Greenhouse Tomatoes							
Spinach							
Spring Beets							
Spring Carrots							
Spring Onions							
Asparagus							
Salad Greens							
Swiss Chard							
Herbs							
Beets							
Eggplant							
Leeks							
Tomatoes							
Blueberries							
Peas							
Zucchini/Summer Squash							
Baby Potatoes							
Gooseberries							
Raspberries							
Saskatoons							
Strawberries							
Beans (green, yellow, dried)							
Cantaloupe/Musk Melon							



	May	June	July	Aug	Sept	Oct	Nov-Feb
Cucumbers							
Watermelon							
Broccoli							
Cauliflower							
Kale							
Kohlrabi							
Peppers							
Rutabagas							
Sweet Corn							
Parsnips							
Apples							
Brussels Sprouts							
Celery							
Beef - all year							
Cabbage - all year							
Carrots - all year							
Cheese- all year							
Cultivated Mushrooms - all year							
Eggs - all year							
Elk - all year							
Flour - all year							
Garlic - all year							
Onions - all year							
Pork - all year							
Potatoes - all year							
Pumpkins - all year							
Rabbit - all year							
Winter Squash - all year							

**Adapted from** : Megens, S., Roy, R., Murray, D., & Harry Cummings and Associates. (2014). *Institutional Local Food Procurement: A field guide for managers and cooks.* [Accessible Online.](#)

# MENU PLANNING DETERMINING PRODUCTS ORIGINS

## Fresh Vegetables

Item	Product Specifications	ONT	Regional	Not Local	Local Priority	Brands and Suppliers
Artichoke						
Asian Vegetables						
Asparagus						
Beans (Green/ Wax)						
Beets						
Bok Choy						
Broccoli						
Brussels Sprouts						
Cabbage						
Carrots						
Cauliflower						
Celery						
Corn						
Cucumber (field)						
Cucumber (greenhouse)						
Eggplant						
Garlic						
Leeks						
Lettuce (assorted)						
Lettuce (greenhouse)						
Mushrooms						
Onions (cooking)						
Onions (green)						
Onions (red)						
Parsnips						
Peas (green)						
Peas (snow)						
Peppers (field)						
Peppers (greenhouse)						
Potatoes						
Radishes						
Rapini						
Rutabaga						
Spinach						
Sprouts						
Squash						
Sweet potatoes						
Tomatoes (field)						
Tomatoes (greenhouse)						
Zucchini						
Other:						
Other:						
Other:						
Other:						

# Fresh Fruits

Item	Product Specifications	ONT	Regional	Not Local	Local Priority	Brands and Suppliers
Apples						
Blueberries						
Cherries						
Currants (Red/ Black)						
Grapes						
Melon						
Pears						
Plums						
Raspberries						
Rhubarb						
Strawberries						
Strawberries (day neutral)						
Watermelon						
Other:						
Other:						
Other:						

## Preserved Fruits and Vegetables, Honey and Maple Syrup

Item	Product Specifications	ONT	Regional	Not Local	Local Priority	Brands and Suppliers
Broccoli, frozen						
Beans, dried						
Beans, green, canned						
Beans, green, frozen						
Carrots, frozen						
Corn, frozen						
Peas, green, canned						
Peas, green, frozen						
Tomatoes, diced, canned						
Tomatoes, whole, canned						
Tomatoes, stewed, canned						
Tomato Ketchup						
Tomato Juice						
Apple sauce, canned						
Apple juice, canned						
Apple juice, tetra boxes						
Sauerkraut						
Cucumber pickles						
Mushrooms, canned						
Honey						
Maple Syrup						
Other:						
Other:						
Other:						
Other:						
Other:						
Other:						
Other:						

## Meat, Poultry and Dairy

Item	Product Specifications	ONT	Regional	Not Local	Local Priority	Brands and Suppliers
Beef, ground						
Beef, patties						
Beef, roast (institutional)						
Beef, liver						
Beef, stewing pieces						
Chicken, breasts (boneless)						
Chicken, thighs						
Chicken, whole						
Chicken, burgers						
Chicken, cooked, pieces						
Turkey, whole						
Turkey, cutlets						
Pork, bacon						
Pork, chops						
Pork, sausage						
Pork, ground						
Pork, ham roast						
Lamb						
Veal, steakettes						
Eggs, fresh						
Deli sandwich meat slices						
Eggs, liquid						
Milk, liquid						
Cream, liquid						
Yogurt						
Ice Cream						
Butter						
Sour Cream						
Cottage Cheese						
Cheese						
Other:						
Other:						

**Adapted from** : Megens, S., Roy, R., Murray, D., & Harry Cummings and Associates. (2014). *Institutional Local Food Procurement: A field guide for managers and cooks*. [Accessible Online](#).

# IMPLEMENTATION

## PRODUCER - SUPPLIER QUESTIONNAIRE

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### Producer or Supplier Information

Business Name: \_\_\_\_\_

Contact Person(s): \_\_\_\_\_

Contact Information: \_\_\_\_\_

### Product Information

Product Offered	1.	2.	3.	4.
Product Origin				
Amount Available				
Season/ Month Available				
Price/ Unit Estimate				
Packaging				
Sample Provided?				
Other:				

**Potential Concerns – make note of any concerns related to the following:**

1. Food Safety and Certification
2. Quality, Quantity and Price
3. Packaging and Labeling
4. Traceability and Authenticity
5. Agreement Flexibility e.g. Contract, Letter of Intention, or Personal Agreement
6. Delivery, Timing and Payment Procedure

**Adapted from** : Megens, S., Roy, R., Murray, D., & Harry Cummings and Associates. (2014). *Institutional Local Food Procurement: A field guide for managers and cooks.* [Accessible Online.](#)

# LETTER TO SUPPLIER : REQUEST FOR FOOD ORIGINS

**Note:** Ensure to set out clear terms for what will and will not be shared. Consider whether all results will be shared in aggregate - or if you want any exceptions. For example, do you want to make a list of local products publicly available?

## **The Food Origin Assessment Project Commitment to Confidentiality & Participation Form**

This Food Origin Assessment research project is being undertaken by [FACILITY]. We are requesting information on the origin of foods purchased by our facility. This work is being undertaken to increase the traceability of purchased products and to determine what percentage of the products served in our facility are grown or raised in [PROVINCE].

Your participation in this research is voluntary. However, requests for this information will likely be included in future Requests for Proposals – or will affect future purchasing decisions. Results will be shared with participants.

Every effort will be made to ensure confidentiality of any proprietary information that is provided by you for purpose this study. Only the researchers will review the information your company provides. The information provided will be stored in a secure location, and data collected from it will only be released in aggregate. If you have any concerns, the researchers are available to discuss options to ensure confidentiality while still meeting project/reporting requirements.

Finally, if you have any questions about this study or you would like to receive a summary of the study results, please contact [FACILITY EXECUTIVE].

If you agree to participate in this study, please print and sign your name below.

\_\_\_\_\_  
(Your name – please print)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Your signature)

**Adapted from** : Lapalme, H., Marley, E., & Wylie-Toal B. (2011). *Conducting Food Origin Audits: a step-by-step guide. Do you know where your food comes from?* [Accessible Online](#).

# LETTER TO DISTRIBUTOR : REQUEST FOR LOCAL PRODUCTS

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Sample letter to send to your food distributors as a request to emphasize Product of Ontario in their sales order forms.

Dear (insert name of vendor),

(Name of Organization) is currently seeking more locally grown and raised food to include in our menus. While we have enjoyed working with you in the past, we are optimistic that you will assist us with this effort by clearly identifying the place of origin of the products that you currently offer, and by expanding your local product line to include more seasonal fruits and vegetables, meats and processed foods.

We are committed to purchasing as much local food when it is available, and would like your sales team to clearly highlight Products of Ontario on your order forms each week. We would also like to see an expanded, consistent and reliable supply of Ontario produce available for purchase when it is in season.

The following is a list of Ontario products we will purchase when it is available:

(Ontario produce, meats, cheeses, processed foods that you commonly purchase or would like to purchase.)

Thank you for considering this request.

Yours truly,

(Name)

(Contact information)

**Adapted from** : Guelph Wellington Local Food. (2015). *The Road to Local Food: Increasing Local Food in Broader Public Sector (BPS) Organizations – Guelph Community Health Centre*. [Accessible Online](#). **Original source**: MacLead, M., Scott, J., & Ecology Action Centre. (2007). *Local Food Procurement Policies: A Literature Review*. [Accessible Online](#).



# REQUEST FOR INFORMATION : LOCAL FOOD

## Appendix 3 – Response to RFI

Due August 30, 2013

School District: \_\_\_\_\_

**Response Form for RFI to Supply Locally Grown Fresh and Frozen Fruits and Vegetables to Five Large Urban School Districts in the Midwest – Due August 30, 2013.**

**Please fill out a separate response for each school district you are responding for.**

**Send to:** *List contact name, address, phone and e-mail address*

**From:** \_\_\_\_\_  
Company or farm \_\_\_\_\_  
Contact person \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Website \_\_\_\_\_

Please identify the district you are responding for and **provide a separate response for each district** that you could potentially supply (refer to Appendix 1 for Geographic Preference mileage range/criteria for each district)

- Des Moines Public Schools (400 mile radius)
- Detroit Public Schools (400 mile radius)
- Minneapolis Public Schools (200 mile radius)
- Omaha Public Schools (200 mile radius)
- Saint Paul Public Schools (240 mile radius)

## 1. About you

a. What type of business are you? Please check all that apply.

Distributor  
 Fresh Cut Processor  
 Freezing Company  
 Grower  
 Multi-farm collaborative  
 Other (Please describe) \_\_\_\_\_

b. Please describe your operation (up to 75 words):

c. What was your gross annual revenue in 2012? \_\_\_\_\_

d. How many years have you been in operation? ..... \_\_\_ years / \_\_\_ n.a.

- e. In what year did you begin to pre-cut fresh produce? ..... \_\_\_ / \_\_\_ n.a.
- f. In what year did you begin freezing produce? ..... \_\_\_ / \_\_\_ n.a.
- g. How much liability insurance do you carry? \_\_\_\_\_
- h. Who are some of your current customers?

Customer	State and city or county	Contact person/number

## 2. Local sourcing and processing

- a. **Sourcing** within the **identified mileage range** of the identified school district office

Provide names and location of farms that would supply the produce to the district specified above.

Farm Name	Address including Town and State

If you are not currently able to identify specific farms that you would purchase the produce from, please explain how you would identify sources of locally grown produce in the future (up to 75 words):

- b. **Processing facilities** – within the **identified mileage range** of the identified school district office

Provide names and locations of facilities that would process the produce.

Processing Facility Name	Address including Town and State

### 3. Food safety and growing practices

#### a. Growing practices

Do you/your suppliers:

- i. Have organic certification  
\_\_\_ yes / \_\_\_ no / \_\_\_ mixed / \_\_\_ not sure

#### b. Food Safety on the Farm

Do you/your suppliers:

- i. Have GAP certification? ..... \_\_\_ yes / \_\_\_ no / \_\_\_ mixed/ \_\_\_ not sure
- ii. Use additional or alternative standards for food safety on the farm? If so, please describe. (up to 75 words)

#### c. Processing Facility Certifications

Do all facilities:

- i. Have a HACCP plan? ..... \_\_\_ yes / \_\_\_ no / \_\_\_ n.a.
- ii. Have organic certification? ..... \_\_\_ yes / \_\_\_ no \_\_\_ mixed \_\_\_ not sure

#### d. Packaging and Transportation

##### For frozen produce,

- i. Can you pack produce in plastic bags inside stable boxes?  
(20 – 30 pound boxes are preferred, smaller 10 lb bags within boxes)  
\_\_\_ yes / \_\_\_ no / \_\_\_ n.a.
- ii. Do you use delivery vehicles with temperature controls to maintain the quality and temperature of frozen produce while in transit?  
\_\_\_ yes / \_\_\_ no / \_\_\_ n.a.

##### For fresh produce,

- iii. Do you use delivery vehicles with temperature controls to maintain the quality and temperature of fresh produce while in transit?  
\_\_\_ yes / \_\_\_ no / \_\_\_ n.a.

## 4. Fresh and frozen produce

In the chart below, the columns provide or ask you for the following information:

- Item** – The type of produce and the specification for cut, size or other specification. All frozen items are requested as individually quick frozen (IQF).
- Growing Practices** – Whether the produce is grown conventionally or certified organic.
- When available** – During what periods of time do you anticipate being able to provide each item (e.g., Sept 1 – Oct 15)?
- Unit size** – Standard unit sizes with desired packing specifications.
- Grade A - Units Available** – What is the total number of Grade A units you can provide in the unit size specified during the school year?
- Grade A - Price / unit** – Given the volume you can provide, what is your anticipated Grade A price per unit (e.g., price per 20# box, assuming that you would supply a given number of boxes)?
- Seconds - Units Available** – What is the total number of units of cosmetically imperfect seconds (see explanation on p.2 of the RFI) that you can provide in the unit size specified during the school year?
- Seconds - Price / unit** – Given the volume you can provide, what is your anticipated seconds price per unit (e.g., price per 20# box, assuming that you would supply a given number of boxes)?

Item	Growing Practices	When Available	Unit Size	Grade A		Seconds	
				Units Available	Price/unit	Units Available	Price/unit
Apples – sliced	Organic		100 in 2 oz bags				
	Conventional						
Apples – Empire, Fuji, Gala, Golden, Jonathan, MacIntosh or other varieties	Organic		138 / case				
	Conventional						
Cherries	Organic		20# boxes				
	Conventional						
Grapes – green/red, seedless	Organic		20# boxes				
	Conventional						
Melons – cantaloupe, honeydew	Organic		35# boxes				
	Conventional						
Pears	Organic		138 / case				
	Conventional						
Peaches – yellow	Organic		138 / case				
	Conventional						

**Adapted from :** *School Food Focus. (2014). Request for Information from farmers, processors, and distributors. Accessible Online.*

# RFP: EXAMPLE OF A SUSTAINABILITY QUESTIONNAIRE

This is an example of a sustainability questionnaire to be completed by potential vendors. This form is included in Humber College's request for proposal.

<p><b>Respond only Yes/No for each question below;</b></p> <p><b>If YES for any of these, please include information about it in your proposal.</b></p>	<p><b>YES/NO</b></p>
Does your company utilize sustainable, “green” cleaning products that are third-party certified?	
Do you have proven statistics to reduce energy, water, and waste impacts in food operations?	
Does your company maintain a clear and comprehensive website with accurate, current information, farm-to-table programs?	
Does your proposal address working with the campus community on collaborative research projects?	
Has your company developed an established sustainability food plan and purchasing policy that cover issues such as sustainable seafood, food service franchises, ethical and social standards, food donation, and toxicity in the environment and in species?	
Does your company have a working understanding of existing local farmers and suppliers?	
Is your company open to Humber’s input and collaboration on potential new procurement avenues?	
Does your company maintain minimum annual levels of local foods procurement?	
Do you current have sustainability purchasing targets?	
Does your program offer food and beverage products that meet third-party certification for organic, fair trade, and sustainable food?	
Does your company support local cooperatives that have social responsibility policies, where possible?	
Have you ever sought partnerships that enable your clients to host local businesses and purchase from local and sustainable suppliers?	
Do your annual reports document achievements in meeting agreed targets including actual percent of total cost of sales for local, organic, fair trade, antibiotic and hormone free, seafood certified? Note: This information will be required for public reporting purposes.	
Does your company comply with, and participate in, all present and future Provincial and Campus waste management recycling and composting programs? Note: proper source separation of all streams includes organics, paper, cardboard, recyclables, metals, and hazardous waste. Failure to not properly sort material will result in a waste handling fee payable by the Food Services Supplier.	

Can you demonstrate if asked how your company has a system in place for counting current and future local and sustainably sourced food ingredients? Note: this system should have the ability to generate periodic reports on local, sustainable food procurement.	
Are you in agreement that any individual sustainability initiatives must be approved by Humber prior to being discontinued?	
Does your company provide and collect materials from all catered events that serve beverages or other items and deposit in proper bin (organics, paper, recyclables, and waste)?	
Does your company offer other waste management programs including, but not limited, to:	
- Switching to paper “to-go” food containers (which are unbleached and contain high levels of recycled content) or biodegradable containers at all food service locations.	
- Using paper napkins made with high levels of post-consumer recycled content.	
- Participating in annual waste audits.	
- Provide food service area signage that provides information on sustainable food systems?	

**Adapted from** : Humber College Request For Proposal. Email correspondence July 21, 2015.

# RFP: EXAMPLE OF A PROCUREMENT TRACKING FORM

This is an example of a procurement tracking form to be completed by potential vendors.  
This form is included in Humber College's request for proposal.

**(use percentage based on Provincial, Canadian or Import)**

Category	Where do you typically purchase this item from? (Province, # miles?)	Where is your 2 <sup>nd</sup> likely location that you purchase this item from?	Is the product local AND community based and/or third party verified? [STARS]	Additional Information
Fresh Fruits & Vegetables:				
Ontario Proteins:				
Beef				
Pork				
Poultry				
Fish				
Eggs				
Other				
Frozen Foods:				
Fruits and Vegetables				
Dairy:				
Liquid				
Cheese				
Other – Yogurt etc.				
Fair Trade:				

Coffee				
Chocolate				
Fruits and Vegetables				
Other				
Sustainable*:				
Fruits and Vegetables				
Proteins				
Other				

\*Could mean certified organic, sustainably grown or caught (pesticide or fertilizer-free; Ocean wise or other seafood certification), hormone or antibiotic-free, or otherwise grown or raised using ecological methods of agriculture. This does not mean it necessarily means it is certified, but it does mean the farmer has demonstrated a commitment to produce sustainably.

**Adapted from** : *Humber College Request For Proposal. Email correspondence July 21, 2015.*



# SAMPLE FORWARD CONTRACTS

As stated in Thunder Bay's [Advanced Local Food Procurement Guide](#), forward contracts can be negotiated through informal or formal procurement between the institution and a producer. Although their use is not yet well established with small to medium sized producers that support the local marketplace, forward contracts are a way to encourage existing distribution partners to enter into contracts and build the local food supply chain.

## Example 1

[Name of farmer/vendor representative]  
[farm/vendor business name]  
[address]  
[phone number]  
[email address]

Date

Thank you for your response to our Request for Quotes (RFQ) for fruit and vegetables. After evaluating the quotes by line item, the City of Thunder Bay will be establishing purchase orders with you as listed in the table below. These purchase orders will be good through the quoted availability/harvest season. The quoted price is firm throughout this purchase period.

This document describes the process you will take with the City of Thunder Bay and member institutions Food and Nutrition Services. Please keep this document as an agreement with the institutions, and follow the instruction to fill their order.

You are expected to update schools on product availability/timing approximately 6-8 weeks prior to estimated product delivery (based on submitted forms). Please refer to the timeline in the table below. Member districts will place orders with you based on product availability and menus at least one week before serving.

### PRODUCT, QUOTE & PRODUCT UPDATE TIMELINE

Item	Specification	Availability/ Harvest Season	Volume*			Product Update
			X	Y	Z	

*\*Volumes listed are based upon historic consumption and represent conservative minimum purchase estimates for this contract. Additional volumes may be purchased if price and quantity are acceptable, and/or institutions may buy additional similar items through other channels (main contracted vendors, fresh sheets, seasonal quotes) during the year outside of this award.*

## Orders & Delivery

All deliveries shall be to designated institution sites listed in “Delivery Locations”.

1. Products shall be transported in vehicles that are capable of maintaining the quality and food safety of all products up to the time of delivery and acceptance at the buyer’s specified delivery locations.
2. Delivery should be on the agreed upon date and time discussed with the member institution contact personnel listed in the “Contact Information” when order is placed.
3. When an agreed upon amount of produce may become unavailable, the member institutions require 7 days notice before scheduled delivery (excluding weekend and holidays) so that other arrangements can be made. Any changes in product availability or delivery scheduling must be immediately communicated with the institution contacts.
4. The member districts have the right to refuse produce upon delivery if it does not meet the agreed upon quality and pricing requirements. Damaged or unacceptable product shall be credited to the institutions.
5. Your quote is a unit price and includes delivery cost. The City of Thunder Bay shall not be charged for any additional cost except tax should it incur.

## Invoice & Payment

A detailed invoice must be provided with each delivery of product. The invoice should be separate for each district and contain the following information:

1. Name, address and phone number of vendor/business selling products to each district.
2. Date of delivery
3. Itemized list of quantity, item description, origin of the item (farm, location), unit of sale (ea, cs, lb, etc.), price per unit and extended total price for each item listed on invoice
4. Grand total amount each district has to pay for the total purchase including any applicable sales tax
5. Payment by the district will be net 30 unless other terms have been discussed and agreed to.

**Adapted from** : Megens, S., Roy, R., Murray, D., & Harry Cummings and Associates. (2014). *Institutional Local Food Procurement: A field guide for managers and cooks.* [Accessible Online.](#)

## Example 2 : Producers and Distributors

This example is a template of what a distributor and producer may agree to in advance of harvest for the producer to guarantee a market for its products and for the distributor to guarantee supply to the school districts. The distributor has been competitively procured, so the school district is not involved in this second agreement between the producer and the distributor. The distributor or a farm to school coordinator may help facilitate this agreement. This example was adapted from a template created by Willamette Farm and Food Coalition.

It is the intention of \_\_\_\_\_ *(name of distributor)* to purchase \_\_\_\_\_

\_\_\_\_\_ *(list of products)* from \_\_\_\_\_ *(list of producer(s))*

It is the intention of \_\_\_\_\_ *(producer or processor)* to grow and sell  
the following product(s) to \_\_\_\_\_ *(name of school district)* through \_\_\_\_\_

\_\_\_\_\_ *(name of distributor)*

Product name: \_\_\_\_\_

The total estimated quantity to be delivered: \_\_\_\_\_

The timeframe the product will be ripe for harvest: \_\_\_\_\_ to \_\_\_\_\_

When it will be delivered to distributor: \_\_\_\_\_

Packing requirements: \_\_\_\_\_ Unit pack: \_\_\_\_\_

*(standard box, U.S. grade, loose pack, bulk, etc.)*

Post-harvest handling practices: \_\_\_\_\_

Cost per unit paid to producer: \$ \_\_\_\_\_

*(this may be a range acceptable to both parties)*

Cost per unit paid by school district: \$ \_\_\_\_\_

*(this may be a range acceptable to both parties)*

Payment terms and payment process: \_\_\_\_\_

Other notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Agreed by: \_\_\_\_\_

Producer representative: \_\_\_\_\_

*(printed name, signature, and date)*

School district representative: \_\_\_\_\_

*(printed name, signature, and date)*

Distributor representative: \_\_\_\_\_

*(printed name, signature, and date)*

### Example 3 : State Agencies on Behalf of School

This example is a template of a solicitation a school or State agency might issue to establish a forward contract. This template was adapted from the North Carolina Department of Agriculture and Consumer Services.

Solicitation Number: \_\_\_\_\_

Issue Date: \_\_\_\_\_

Bids Due: \_\_\_\_\_

Contact Information: \_\_\_\_\_

**Award Criteria:** Award will be based on the lowest and most advantageous bid(s) as determined by:

- Price
- Quality of produce offered
- Good Agricultural Practices (GAP) certified
- Geographic preference
- Suitability of produce for intended use
- Conformity with intent of specifications herein
- Guaranteed delivery schedule

**Award of Contract:** It is the general intent to award this contract to a single overall bidder on all items. The right is reserved, however, to make awards based on individual items or groups of items, if such shall be considered by the State to be most advantageous or to constitute its best interest. Bidders should show unit prices, but are also requested to offer a lump sum price.

**General Specifications:** Product must be identified by label indicating the produce from which it originated. If the cases of the product do not have the name of the producer on it, the product will be refused and rejected. Product must be held at the proper temperature as noted in product specifications to begin the cold chain and the cold chain shall not be broken while in custody.

All produce is to be the current season's harvest.

Item	Description	Qty.	Unit	Unit Price	Total Price
1	<p><b>Blueberries</b></p> <p><b>Packed:</b> 12 1-pint clam shells per flat</p> <p><b>Quality:</b> US, No.1, well-colored, not overripe, clean, not crushed, split, leaking, or wet, free from stems, mold, or decay. Blueberries should be no more than 48 hours from harvest to pick up. Acceptable sizes range from med (189/cup) to large (129/cup). Store at 40 degrees or below if held over 24 hour period before pick up.</p> <p><b>Delivery:</b> 3000 flats to be picked up from producer farm on May 19 and May 21</p>	6000	Flats	\$	\$
2	<p><b>Romaine Lettuce</b></p> <p><b>Packed:</b> 24 heads in a box, 40-pound box</p> <p><b>Quality:</b> US Grade No. 1, stored at 40 degrees or below immediately after harvest and packing, Romaine should be no more than 8 hours from harvest to pick up, free from decay, bruised or discolored leaves</p> <p><b>Delivery:</b> 400 boxes to be picked up from producer on April 28, April 30, May 5, and May 7, 2013</p>	1200	Boxes	\$	\$
3	<p><b>Strawberries</b></p> <p><b>Packed:</b> 8 1-pound clam shells per flat</p> <p><b>Quality:</b> US Grade No. 1, cap (calyx) attached, picked ripe, firm, store at 40 degrees or below if held over 24 hour period prior to pick up. Strawberries should be no more than 48 hours from harvest to pick up. Acceptable size: Large—Greater than 1 inch in diameter</p> <p><b>Delivery:</b> 5600 flats to be picked up from producer on April 28, April 30, May 5, May 7, May 11, and May 14.</p>	4000	Flats	\$	\$

**Adapted from :** Conell, C. (2014). *Procuring Local Foods for Child Nutrition Programs*. [Accessible Online](#).

## BASELINE TRACKING AND OPPORTUNITY IDENTIFICATION

	BASELINE 12-month year from [month X-12] to [month X]			CATEGORY REFLECTION & GOAL-SETTING		3-m
Food Category	Total Purchases (\$)	Ontario Purchases (\$)	% Ontario	Challenges & Opportunities	Goals	Total Purchase
<b>Fresh Fruits &amp; Veg:</b>						
<b>Ontario Proteins:</b>						
Beef						
Pork						
Poultry						
Fish						
Eggs						
Other						
<b>Frozen Foods:</b>						
Fruits and Vegetables						
<b>Dairy:</b>	<b>Recommendations</b>					
Liquid	1. Reflect on what sustainability measures matter most to your institution (local, hormone-free, fair trade, etc.) and on which categories you can have the most impact.					
Cheese	2. Recreate and adapt this tool in Excel to reflect the categories you will measure.					
Other-yogurt, etc.	3. Calculate your baseline local, sustainable food procurement based on the last twelve-month period, for exposure to possible seasonal purchasing fluctuations.					
<b>Fair Trade:</b>	4. Engage suppliers in tracking. Share this tool to communicate the information you seek. Request food origin reports on invoices or as quarterly reports going forward.					
Coffee	5. Update monthly or quarterly. Continue to engage your suppliers in this process.					
Chocolate	6. Use this data to set specific targets with your suppliers or in your next RFP.					
Fruits & Vegetables						
Other						

<b>CATEGORY REFLECTION &amp; GOAL-SETTING</b>		<b>QUARTERLY UPDATE 3-month period from [month X] to [month X+3]</b>		
<b>Challenges &amp; Opportunities</b>	<b>Goals</b>	<b>Total Purchases (\$)</b>	<b>Ontario Purchases (\$)</b>	<b>Baseline Increase (%)</b>

**Adapted from** : Public Purse Procurement (3P) Mentorship Program. Tool for Baseline Tracking & Opportunity Identification. Contact hayley.lapalme@gmail.com for a digital version or to discuss.

# AUDIT REPORTING FORM

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<b>Category</b> Sub category	<b>Total</b> <b>Purchases (\$)</b>	<b>Ontario</b> <b>Purchases (\$)</b>	<b>Regional</b>
<b>Fruits and Vegetables (fresh):</b>			
<b>Proteins:</b>			
Beef			
Pork			
Poultry			
Fish			
Other			
<b>Frozen Foods:</b>			
Fruits and Vegetables			
Proteins			
Entrees			
Desserts			
Other			
<b>Dairy:</b>			
Liquid Milk			
Eggs			
Cheese			
Other			
<b>TOTAL:</b>			

**Adapted from** : Megens, S., Roy, R., Murray, D., & Harry Cummings and Associates. (2014). *Institutional Local Food Procurement: A field guide for managers and cooks.* [Accessible Online.](#)



Use this guide to help researchers consistently report interview findings in the Origin Database. Each bolded scenario has a strategy for reporting findings uniformly.

## **Reporting percentages:**

- Some foods will have multiple origins (from multiple suppliers, or different suppliers at different times of the year), and will therefore be report food origins in percentages
  - Example: Apples are from Ontario 90% of the time, USA other 10%; canned soup is 50% tomatoes from Ontario, 20% mixed vegetables from USA
- When reporting, use 10% ranges since numbers are usually estimates (e.g. 50-59%, 60-69%, 70-79%...)

## **Reporting ingredients/products with many origins:**

- Where all origins are equal: *[Ontario + Quebec]*
- Where origins are not equal, list in decreasing order, with percentages if possible: *[70% Ontario > 20% California > 10% Chile]*
- If origins are many but uncertain, inquire about origin from the previous year and list possible sources in order of decreasing likelihood *[likely: Mexico + USA > Chile > Ecuador + Global Markets, where the product is equally likely to come from the USA as Mexico, but decreasingly likely from Chile, Ecuador, and other sources from the global market]*

## **Reporting information for many ingredients in the same product:**

- Use a different row in excel for each ingredient
- Follow standard reporting methods for individual ingredients

## **Reporting when the supplier says they don't know the origin:**

- Ask again! (see Strategies for Communicating with Suppliers)
- If unsuccessful, mark as “undisclosed”

## **Reporting on the status of a SKU:**

- When all requested information is provided, mark as “Reported”
- When the request is pending, mark as “Follow-Up”
- When the supplier is unwilling or unable to disclose the origin, mark as “Undisclosed”
- Colour code each of these statuses for quick surveys of progress

## **Reporting on “local”**

- Use one definition consistently to determine (yes/no) whether to report a product as local
- Or use two columns to capture more detail, e.g. a product meets one stricter definition but perhaps not the broader definition (e.g. NO to the Foodland Ontario definition but YES to the 75% Ontario definition)

## Reporting information that does not fit the parameters of the database

- Include this information in the notes column

This form is a useful tool in many situations. It can be used:

- When introducing the project to a supplier. Sending the form prior to the phone interview will help suppliers prepare their responses.
- When a supplier is struggling to provide responses during a phone interview and wants help from their team to provide the requested information.
- When a supplier opts to forego the interview and complete the form autonomously – especially if they have a large number of products for which to provide information.

## Simplified Origin Form

Products from [Manufacturer Name]

Red outlined cells are for the supplier to complete

Item	SKU	Unit	First Ingredient	Characteristics of the Main Ingredient		
				% of Total Product by Mass (e.g. 50-59%, 60-69%...)	Country of Origin	If from Canada, where and how much from ON ?
e.g. Hamburger Patty	[Researcher section]		e.g. Ground beef	e.g. 85% or 80-89% (provide number or a 10% range)	e.g. Canada	e.g. Brantford, 60-69% (provide 10% range)
Bacon	676767	5 kg				
Bacon, Super	989898	5 kg				
Chicken, Breast Strips	434343	3.2 kg				
Ham Boneless Chopped	232323	2 X 5 kg				
Roast Chicken Breast	121211	2 X 3 kg				

Note : Column can be added to this form to gather information for secondary and tertiary ingredients as well. When collecting information for additional ingredients, color code them (e.g. where “Characteristics of the Main Ingredient” is green, make “Characteristics of the Second Ingredient” hot pink... or turquoise!)

**Adapted from** : Lapalme, H., Marley, E., & Wylie-Toal B. (2011). *Conducting Food Origin Audits: a step-by-step guide. Do you know where your food comes from?* [Accessible Online.](#)

# REPORTING METHOD FOR FOOD ORIGINS

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Use this guide to help researchers consistently report interview findings in the Origin Database. Each bolded scenario has a strategy for reporting findings uniformly.

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# SUSTAIN ONTARIO

THE ALLIANCE FOR HEALTHY FOOD AND FARMING

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