



Farm to School Procurement Checklist

Every school meal is an opportunity. By sourcing California-grown fruits and vegetables, you can provide students with fresh, local meals while building connections to local agriculture.

Start with what you know. Consider a produce item you purchase regularly and explore how to source it from a local farm. With thoughtful planning, you can incorporate local purchasing while remaining compliant with federal and state procurement requirements.

Ask the right questions. Managing expectations from the outset is essential for building a strong and mutually beneficial relationship with local farmers and food producers.

Celebrate your wins. Every step of the process matters. Thank you for your dedication to nourishing students with fresh, local food.

Step 1: Review Internal Processes

- Check for Conflict of Interest:** Do you, a department staff member, school administrator, or board member have a personal relationship with the farmer? Do any involved parties have a financial interest in the sale of these products?
- Update Procurement Code of Conduct**
- Define Payment Terms:** Can the farm accommodate delayed payments due to invoice processing timelines?
- Secure District and Board Approval** (If applicable)
- Obtain Completed Vendor Application** (If applicable)



Step 2: Prepare for Partnership

- Assess Delivery Readiness:** What delivery conditions can the site accommodate? Will delivery be via van, pickup truck, or box truck? Will the delivery be on a pallet? Is there a loading dock? Does the truck have a lift gate? Or, can you pick up?
- Understand Onsite Processing Abilities:** Do staff have the tools and training to wash and process fruits and vegetables? What about items larger than a ½ cup serving (e.g., melons)?
- Determine Storage Capacity:** Is there enough storage space? Is there adequate cold storage?
- Communicate Funding:** Clearly explain the grant terms and funding limits to the farmer.

Step 3: Determine Purchase Levels

- Micropurchase:** Determine if you are able to self-certify.
- Simple Acquisition**
- Formal Bid / Contracted Vendor**
- Piggyback Agreements:** Obtain a formal letter from the district authorizing use of the piggyback agreement. Review and monitor the terms and limits outlined in the piggyback clause.

Step 4: Determine Ordering and Delivery Capabilities

- Primary Contact(s) for Ordering, Delivery, and Issue Resolution:**
How will orders be communicated? Who do you call if issues arise?
 - Delivery Capabilities and Locations:** Can the farmer deliver to you directly? Is the farmer able to deliver to multiple school sites?
 - Delivery Frequency and Timing:** How often will deliveries occur? What time of day will they be made?
 - Product Specifications**
 - Value-Added Processing:** Can the farmer provide pre-cut items? Can they pre-wash items, such as lettuce?
 - Third-Party Processor:** Are there third-party processors involved? What are the logistics?
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Step 5: Maintain Clear Records

- Keep Temperature Logs:** This information is required for all refrigeration units and during transport.
 - Track Harvest Details:** Maintain records of product type, date and location of harvest, and proximity to school sites. (If applicable)
 - Keep Records:** All records must be kept for a minimum of three years after the end of the school year.
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Step 6: Ensure Proper Documentation

When considering a new partnership, check for the required and recommended documentation:

- Business License** *Required*
- W-9 Form** *Required*
- Liability Insurance** *Required*
- Food Safety Documents:** Does the farm have a food safety plan or documentation demonstrating compliance with state and federal regulations? Do they have a third-party certification, such as the USDA Good Agricultural Practices (GAP)? *Recommended*
- Crop Availability:** Ask for a planting calendar indicating crop availability and projected quantities. *Recommended*

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