

III. APENDICES

APPENDIX A: SCHOOL BUSINESS ACTION PLANNING GUIDE



— School Business Action Planning Guide —

This guide is intended to be used in conjunction with your Farm to School Producer Workbook. After each module, your trainer will prompt you to check in about what you learned and where you need to “dig deeper.” The action planning prompts below will help you identify your short-term and long-term strategies for moving forward with selling to schools.

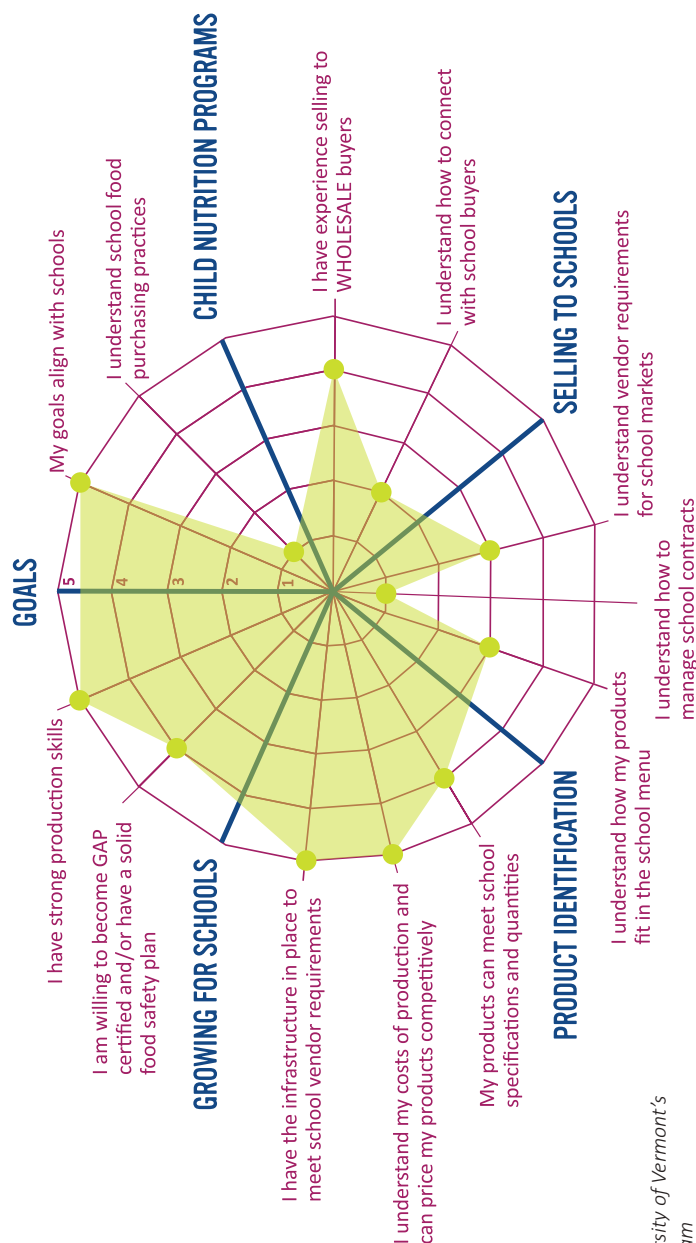
Farm to School Skills and Resources

First let’s look at how your knowledge, skills and resources align. The University of Vermont’s Beginning Farmer Program sees the skills and resources needed to get started in farming as overlapping, reinforcing, and interconnected – more like a web than a checklist. Our team has adapted this web for farmers interested in selling to schools, as shown in Figure 1.

Each category in the School Business Assessment is arranged by the learning objectives for each module of the training program. Figure 1 shows a farm business assessment that was completed by a farm that:

- Has a mission and whole-farm goals that align with school sales
- Has strong production and financial management skills and food safety protocols in place
- Is familiar with selling through wholesalers
- Is not familiar with procurement and what it takes to be a vendor for schools

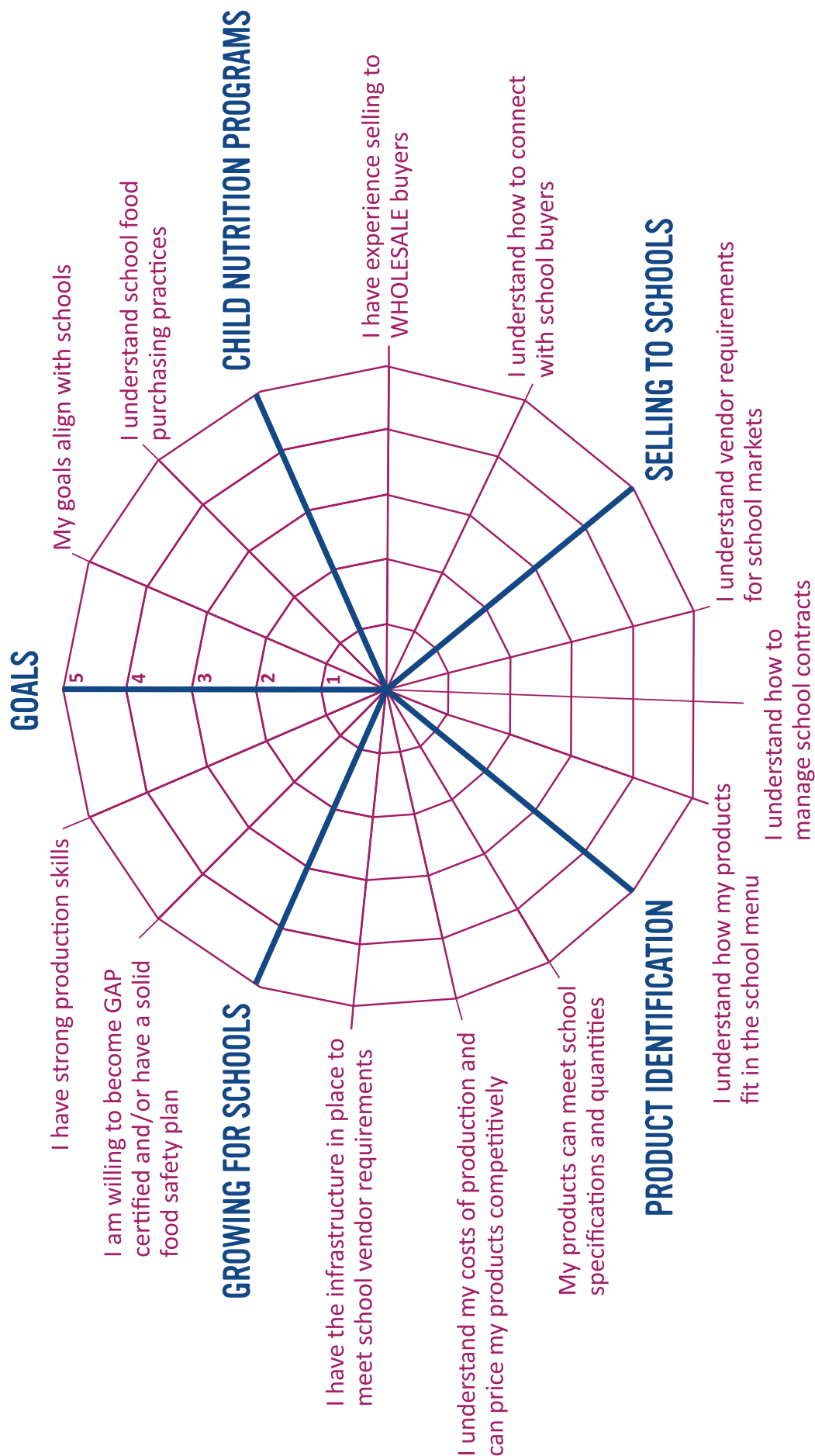
Figure 1. Sample School Business Assessment



Adapted from the University of Vermont's
Beginning Farmer Program

Score yourself on a scale of 1-5 with “1” indicating little to no skills or resources and “5” indicating very strong skills and ample resources.

Figure 2. School Business Assessment



Adapted from Brumfield, Robin, G. January 2005. *To Market, To Market: A Workbook for Selecting Market Options and Strategies for Agricultural Products*. Rutgers Cooperative Research and Extension, New Jersey Agricultural Experiment Station, New Brunswick.

Now that you have an idea of what skills and resources you can apply when selling to schools, let's see how your goals align.

Benefits of farm to school that interest you (check all that apply):

- | | |
|---|--|
| ☐ Expanding into a new market (i.e., schools) | ☐ Increasing access to fresh and local foods in your community |
| ☐ Expanding product offerings | ☐ Increasing agriculture and nutrition educational opportunities for students |
| ☐ Increasing quantity and/or frequency of sales | ☐ Promoting farming as a career path and lifestyle choice for youth in your community |
| ☐ Diversifying market strategy (e.g., marketing to students and families by hosting farm visits or barn-raisers) | ☐ Increasing the visibility of small- and medium-sized family farms |
| ☐ Growing your brand by building relationships with school communities | ☐ Managing risk (e.g., through market diversification and consistent sales) |
| ☐ Nourishing kids with healthy, fresh food | |
| ☐ Other: | |

How do your motivations for selling to schools align with your farm goals?

What does success look like for each of your farm to school-related farm goals?

What information do you need to achieve these goals?

Who can help you accomplish these goals? (e.g., farm to school trainer, business partner, school food service relationship, etc.)

What materials and resources do you need to achieve these goals? (e.g., capital, infrastructure, labor, transportation network, etc.)

School Business Action Plan:

End-of-Module Check-In's

This action plan is where you will outline your short-term strategies to move forward with school sales. After each module, you will be prompted by your trainer to assess your knowledge gaps for that module using the check-in questions below. After assessing your gaps, proceed to fill in the action plan by identifying your short-term strategies and next steps.

Considerations for producers when developing a School Business Action Plan:

- Motivations to participate in or expand school markets (values and goals)
- Short-term and long-term goals for farm to school sales
- Break-even point needed to cover expenses and earn a profit
- Value producers can provide schools
- Action steps for the next six to 12 months following the training
- Resources, contacts, and any additional information needed to implement the plan

Module 1: Getting to Know School Markets

- ☐ I understand the diversity of product needs for Child Nutrition Programs.
- ☐ I understand how Child Nutrition Programs develop menus as well as process and prepare local foods.
- ☐ I know what types of local products schools typically want to purchase.
- ☐ I understand the basics of how school districts source and procure local foods for school meal programs.

Module 2: Selling to School Markets

- ☐ I understand the market channel options—direct, intermediate, and wholesale distributors—for selling to schools.
- ☐ I know the basics of working with intermediated and national wholesale distributors.
- ☐ I know how to find and respond to school solicitations.
- ☐ I know who to communicate with at the school district.
- ☐ I understand common school purchasing practices, quality standards, and vendor requirements.
- ☐ I understand how schools expect to receive local products (i.e., order and delivery process, quality management, and post-harvest handling practices).

Module 3: Product Development for School Markets

- ☐ I understand how my products can fit into school meal menus.
- ☐ I understand how my products could be processed to meet school demand.
- ☐ I understand the tools I can use to price my products for school sales.

Module 4: Growing for School Markets

- ☐ I understand the “break-even” price point I need for my products to enter or expand into school sales.
- ☐ I understand the weak links to consider before scaling up my farm (e.g., infrastructure, food safety, distribution, etc.).
- ☐ I have the beginning of a production plan for my product(s).
- ☐ I understand and can communicate my food safety practices to School Food Authorities.

Using the School Business Action Plan Table below, outline the short-term strategies, action steps, and corresponding timeline needed to address the knowledge gaps you identified after each module. Remember to apply SMART goals to your action plan.

Table 1. School Business Action Plan			
Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions— who’s responsible, important dates, benchmarks, etc.)
Module 1: Getting to Know School Markets Including, but not limited to: • Knowledge of the school districts in my region that serve local food • Alignment of current production and infrastructure with school market needs			

Module THEMES	Short-Term STRATEGY (the short-term strategy to support progress towards your long-term goals)	Recommended ACTION STEPS (immediate actions after leaving this training)	Action TIMELINE (process to start/complete actions— who’s responsible, important dates, benchmarks, etc.)
Module 2: Selling to School Markets Including, but not limited to: • Market channel choice (direct, intermediate, or national wholesale distributor) • Identifying and responding to school solicitations • Communicating with school districts • School purchasing practices, quality standards, and vendor requirements • Meeting school expectations (e.g., order and delivery process, quality management, and post-harvest handling practices)			

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Module 3: Product Development for School Markets Including, but not limited to: • Choosing products to sell to schools • Product processing needs • Break-even price points for products being sold to schools			

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Module 4: Growing for Schools Including, but not limited to: • Break-even price points for school sales • Weak links in farm/business • Product production plan • Food safety			

Resource NEEDS and tools for SUPPORT

(information, purchases, tools, people, resources identified in this training, partners, funding, etc.)

Bringing the Farm to School Action Plan Conclusion: Tying it All Together

Farm to School MARKET CHANNEL	VALUES PITCH	KEY RESOURCES you need to enter or expand into chosen market channel	KEY NEXT STEPS to move forward with school sales	KEY PRODUCTS to sell to school buyers and their BREAK-EVEN POINTS	KEY PARTNERS and team members that will help you achieve your goals
Local school:					
Intermediated (e.g., food hub):					
National wholesale distributor:					
For example, Durango School District; Western Montana Growers Cooperative; Food Services of America.	What makes your product different or unique? Why should schools be interested in purchasing from you?	What information, tools, resources identified in this training, funding, etc. do you need?			For example, business partners, Farm Service Agency officers, USDA Regional Farm to School Lead, Cooperative Extension Agent, State agency representative, etc