

inform their customers of their product sourcing. Charlie's Produce, for example, generates a weekly list of available produce, detailing their origin and any possible certification of the produce. While many distributors already using local sources when possible, they do not currently have the resources in place to inform their clients of product sources. For example, distributors do not regularly record the origin of the products they receive.

## Procurement Policies

School districts perceive that procurement policies create challenges for purchasing local food for school meals. In reality, federal, state, and local procurement policies offer opportunities for school districts to integrate local produce into school meals. The box to the right explains why school districts must comply with these procurement policies.

Several procurement methods are available to schools, including competitive bidding, competitive proposals, and small purchase:

- Competitive bidding requires school districts to solicit bids publicly for a fixed-price contract. The school selects the bidder with the lowest price.
- Under the competitive proposal process, school districts send out a request for proposals (RFP) from a number of sources and publicize the request. Schools may select vendors based on quality and customer service factors; however, schools must ultimately use price as the main basis for selection. Selection factors can include opportunities for students to visit farms, or farmers to visit schools, as ways to build relationships between farms and schools.
- The small purchase procurement option is a relatively informal method of procurement that a school district can use for "small" purchases. Under the small purchase program, school districts do not need to publicize a bid or proposal. Nutrition services directors also indicated that while they might use the small purchase procurement method for emergency purchases, they still obtain verbal bids to ensure that they obtain the best price for the best product.
- These procurement methods allow schools to track the amount of local food they purchase and serve. Kristy Obbink, Nutrition Services Director at Portland Public Schools, said that the district is planning to develop

## Competitive Bidding and Request for Proposals (RFP)

Until 1990, public agencies had to award contracts to the lowest bidder based on sealed bids. Public agencies could not pay more for quality or service. Since then, the federal government has loosened competitive bidding requirements to allow for RFPs that reflect quality and performance criteria rather than sealed price bids (Eakins, 2005).

Competitive bidding rules seek to ensure that all vendors have access to free and open competition when seeking contracts with public agencies. Free and open competition means that all suppliers are playing on a level playing field with the same opportunity to compete (Food and Nutrition Service, December 2005).

School districts usually issue several different proposals for different sets of products. For example, the district issues separate RFPs for produce, meat, bread, milk, dry goods, and commodity foods. School districts may make small, unplanned purchases throughout the school year if they realize they need more of a product.

and implement several new measures it will use to chart its progress in a few key areas. Obbink said that one of the metrics would assess how much local food the school currently purchases. Measuring and tracking purchasing patterns over time is essential for a school district to understand how much local produce it purchases now and set goals for purchasing more local food within procurement rules.

See *Appendix B* for more information about Oregon's procurement rules.

Procurement rules prohibit school districts from using geographic preferences when awarding a contract. However, USDA's Food and Nutrition Service published a draft document as guidance in December 2005 clarifying that building partnerships between schools and local farmers does not require the use of geographic preferences, which could actually exclude local farmers who live on the wrong side of a state or other jurisdictional boundary. The guidance document suggests that schools can identify and encourage local farmers to submit bids, look into alternative package sizes and distribution methods that reflect product availability, and design menus that use products available through local farms (2005).

Moreover, the USDA now encourages schools to purchase local food. The 2002 Farm Bill added language to the National School Lunch Act directing the Secretary of Agriculture to:

Encourage institutions participating in the school lunch program under this Act and the school breakfast program established by section four of the Child Nutrition Act of 1966 to purchase, in addition to other food purchases, locally produced foods for school meal programs, to the maximum extent practicable and appropriate...

Before this language, USDA simply allowed schools to purchase local food. Now, USDA encourages schools to purchase local food (Harmon, 2003).

## Program Administration

School nutrition services directors and Oregon Department of Education Child Nutrition Program staff report that buying local food can create administrative burdens in often strained nutrition services departments. While federal, state, and local policies may allow districts to make smaller purchases under the small purchase or intermediate procurement methods, extra paperwork and time accompanies each extra purchase. In addition to burdens on schools, Farm to School programs can create administrative burdens for distributors and farmers, particularly during the beginning phase of the program.



## Conclusion

School districts, farmers, and distributors all must address their own unique challenges when integrating local produce into its meals. The list provided in this chapter identifies many key challenges, as well as the opportunities integrating local produce can create for school districts, farmers, and distributors. The considerations above, as well as the examples of successful Farm to School programs described in Chapter 2, demonstrate that communities can overcome challenges and take advantage of the opportunities offered by Farm to School programs.



## Chapter 4 Recommendations

This section describes our recommendations for strategies to increase the amount of local produce in meals served by school districts in Portland. These recommendations address the three goals of the Local Lunches initiative:

- To provide realistic strategies given cost constraints and the current system;
- To encourage collaborative action among stakeholders; and
- To create alternatives to the existing federal, state and local policy framework.

The following is a list of the stakeholders with potential interest in a program that prioritizes local produce in Portland's schools. The primary stakeholders listed in the box will ultimately decide whether to implement a Local Lunch program, but the secondary stakeholders can provide critical support to prospective programs.

### Local Lunches Stakeholders

#### Primary

School Nutrition and/or Food Services Personnel, School Superintendents, Boards of Education, Parents, Students, Farmers and Distributors.

#### Secondary

**Federal, State and Local Agencies:** Departments of Agriculture, Education, Public Health, Environmental Quality, Health Services/Nutrition, Universities, and Planning Departments.

**Federal, State, and Local Policymakers:** Elected Officials.

**Community Advocate Groups:** Public Health, Child Nutrition, Public Education, Sustainable Practices, Farmland Preservation, Food System Development, Buy Local Campaigns, Farmers, and the Environment.

# Goal One: Provide Realistic Strategies Given Cost Constraints and the Current System

## Recommendations

- A. Celebrate Local Produce
- B. Design a Seasonally-Responsive Menu
- C. Explore Value-Added Services
- D. Provide Point of Origin Information

## Relevant Stakeholders

Schools, Distributors, & Farmers

Stakeholders can begin to integrate local produce in school meals now. The recommendations listed in table above and described in this section offer strategies school districts can use to incrementally increase the amount of local produce in school meals within the existing policy framework.

### A. Celebrate Local Produce

Occasional events once a month or a few times a year introduce students and staff to local produce. For examples, schools and farmers could launch a “farmer of the month” event where the cafeteria highlights one local item and the farmer who grows it. A school could also implement a less frequent event, such as an annual harvest festival featuring a variety of local, seasonal produce.

**Recommendation: Host special events and programs.**

Schools with salad bars can incorporate a number of local produce items. The salad bar can also incorporate items that can be stored and used in the winter months, such as dried fruits, nuts, and seeds.

**Recommendation: Offer a salad bar featuring local produce.**

If schools utilize “made from scratch” production, they can potentially incorporate local food into one main dish item, such as pizza, and label the meal accordingly. Connecticut, for example, developed a logo called Connecticut Grown. The logo seeks to market local products to students.

**Recommendation: Integrate local produce into one main dish item.**

Many successful Farm to School programs started with one side dish item, such as a fruit cup, to introduce the idea of local food to students. North Carolina serves a local berry cup, and South Windsor School District in Connecticut created a baked potato bar.

**Recommendation: Add local produce as one side dish item.**

### B. Design a Seasonally-Responsive Menu

As noted in Chapter 3, research suggests that current school menus rely heavily on non-local food. Menus that reflect the seasonal availability of produce lay essential groundwork for purchasing seasonal produce in the future.

**Recommendation: Change school menus to better reflect the seasonal availability of produce.**

### C. Explore Value-Added Services

In order to sell directly to schools, farmers may need services that distributors would otherwise offer, such as light processing, storing, freezing, and packaging. Some farmers across the country have used a farmer cooperative model to access these needed services. By combining their resources, a group of farmers can acquire the processing and packaging facilities they need to serve schools.

**Recommendation: Determine what farmers need by investigating current farmer organizations, such as the Oregon Fresh Market Growers Association, and exploring other ways farmers could access needed processing, storage, packaging, and freezing services.**

### D. Provide Point of Origin Information

In order for schools to keep track of the amount of local produce they serve, distributors need to provide information on the source of their produce. Providing point of origin information can often require many changes within a distribution company and cannot happen overnight. However, distributors are responding to customer demand and beginning to provide this information. While this information begins with the distributors, the schools need to do their part as well by labeling their products to help educate students about where their food comes from.

**Recommendation: Encourage schools and distributors to work together to assemble information on the sources of the produce the school buys.**

## Goal Two: Encourage Collaborative Action Among Stakeholders

### Recommendations

- A. Create a Program or Organization to Support Local Lunches
- B. Support Networking Among Key Decision Makers
- C. Create a Collaborative Decision Making Process

### Relevant Stakeholders

State & Local Agencies and Community Groups

Farmers, distributors, and school food service directors need to understand each other's constraints and capabilities. The three recommendations listed above and described below address the need to build relationships among Local Lunches stakeholders.

### **A. Create a Program or Organization to Support Local Lunches**

No organization or program in the Portland metropolitan region focuses on integrating local produce into school meals. A public agency, nonprofit agency, or farmer organization can play a key role in building and maintaining relationships between farmers, distributors, and food service directors. Connecticut and Washington, for example, have dedicated programs to small farm direct marketing within their agriculture departments. California's Grower's Collaborative and Wisconsin's Homegrown Lunch are nonprofits that have organized farmers, facilitating the school-farmer relationship. Many of these programs support farmers' efforts to sell to other institutions as well.

**Recommendation: Create a program or organization to support efforts of Portland schools to integrate local produce into their meals. Several types of organizations could sponsor a program, including an existing public, nonprofit, or private organization.**

### **B. Support Networking Among Key Decision Makers**

Farm to School guides identify several outreach activities that help build relationships beneficial to the creation of Farm to School programs, including resource guides, forums, and workshops. The box to the right provides an explanation of network and marketing tools used for outreach opportunities.

These types of efforts have enabled farmers, distributors, and food service directors to form working relationships that have led to more local produce in school meals

**Recommendation: Sponsor events that encourage networking among key Farm to School decision makers. Develop a strategy for networking opportunities that meet the needs of a community using surveys and other research instruments.**

### **C. Create a Collaborative Decision Making Process**

Thriving Farm to School programs highlight collaboration among



stakeholders as the key to their success. Implementing Farm to School programs in Portland will require collaborative decision making among active stakeholders. Collaboration is often the key to securing grants for farm to school efforts. For more information about funding opportunities see *Appendix C*.

**Recommendation: Create a collaborative decision making process among stakeholders. Communities need to establish steps in this process to reflect their individual needs.**

## Networking and Marketing Tools

**Surveys:** Nonprofit and public agencies have used surveys to learn about the purchasing preferences of schools, the capacity of local farms, and to gauge interest in Farm to School programs. Organizations have primarily surveyed farmers, schools, and distributors.

**Resource guides:** Organizations have used resource guides to provide a variety of specific information about stakeholders who are interested in participating in a Farm to School program. Resource guides also offer tips for building these partnerships. For example, the Washington State Department of Agriculture developed a resource guide that contained strategies and incremental steps for implementing Farm to School programs. Portland Farm to School advocates could model a resource guide after the Chef's Collaborative handbook, which connects local chefs and restaurants with local farmers.

**Workshops and forums:** Organizations have used workshops and forums to bring key decision makers together to discuss how a Farm to School program could work. For example, government agencies have sponsored special events that allow food service directors to visit their local farm. Educational workshops and speaker forums can also bring key decision makers together. The common thread among these types of activities is that organizations offer a common place for farmers, distributors, and food service directors to meet.



## Goal Three: Create Alternatives to the Existing Policy Framework

<b>Recommendations</b>	<b>Relevant Stakeholders</b>
A. Advocate for Increase in Reimbursement Rates	Community Advocate Groups, Schools and Distributors
B. Create a Farm Direct Marketing Program	State & Local Agencies
C. Prioritize Local Purchasing in RFP's and Procurement Policies	Schools
D. Incorporate Nutrition Education into Classrooms	Schools, Elected Officials, and Federal and State Agencies

The current political and economic framework constrains the capacity of primary decision makers to implement Farm to School programs. The four recommendations listed in Table 3 and detailed below address these constraints.

### **A. Advocate for Increase in Reimbursement Rates**

As noted in Chapter 3, federal reimbursement rates for meals served through the National School Lunch Program (NSLP) are relatively low. In addition, Oregon does not provide a supplemental reimbursement for meals served through the program. Allocating state and federal funds to increase NSLP reimbursement rates would help schools integrate higher quality, nutritious food, including local fruits and vegetables, into meals.

**Recommendation: Advocates should lobby Congress and the U.S. Department of Agriculture (USDA) to build the capacity of schools to serve nutritious local food by increasing the federal reimbursement rate for school lunches. Advocates should also encourage the Oregon Legislature to follow the lead of other states in supporting a healthy and nutritious school meal program by funding a small per-meal supplemental reimbursement.**

### **B. Create a Farm Direct Marketing Program**

The political climate in Oregon favors commodity farms, big business, and export agriculture rather than local and small-scale agriculture. In some states, such as Washington and Connecticut, agriculture

departments have dedicated initiatives to creating new markets for small farms. The Oregon Department of Agriculture (ODA) supports a Farm Direct Nutrition Program that allows low-income families, seniors, and people with disabilities to purchase locally grown fresh produce from authorized farmers at farm stands and farmers markets. While important, this program does not address the comprehensive direct marketing needs of farms. A comprehensive direct marketing program at ODA would provide needed organizational support for Farm to School programs in Oregon.

**Recommendation: Build on the state's Farm Direct Nutrition Program by creating a farm direct marketing office at the state and local level. This office could focus on enhancing opportunities to sell directly to local consumers, including a Farm to School program.**

### **C. Procurement Policies and Request For Proposals (RFPs)**

Federal, state, and local procurement policies and RFPs create opportunities for schools to integrate local produce into their meals. To take advantage of these opportunities, school districts should seek to use RFPs rather than fixed price contracts when possible. Although price is the deciding factor when a school selects a vendor after soliciting RFPs, the school can and should use point methods that value quality and service.

In addition, individual districts establish procurement policies that influence their food contracts. School districts across the country have

changed these policies to prioritize purchasing local produce to the extent practicable within procurement rules. These procurement policies provide long term guidance to school districts as they renew their purchasing agreements with vendors.

**Recommendation: To the extent practicable within federal and state procurement rules, school districts should prioritize local purchasing in RFPs by valuing quality and service in addition to price. School districts also should make a long term commitment to purchasing local produce by establishing procurement policies that state that they purchase local produce to the maximum extent practicable within procurement rules.**

## **D. Nutrition Education**

While nutrition and education were not the focus of this research, it is impossible to separate nutrition education from successful efforts to integrate local food into school meals. Research shows that educating kids about local fruits and vegetables is a critical tool for encouraging them to eat local produce.

Currently, nutrition services departments in Portland school districts have limited or no influence over a school's educational curriculum. Nutrition services staff could work with principals, teachers, parents, and advocates to build an education curriculum that complements a district's efforts to purchase locally grown food. Unfortunately, current school administrative cultures tend to divide nutrition services departments from education departments in schools.

**Recommendation: Incorporate nutrition education into an effort to integrate local food into Portland's schools. Federal and state policymakers should design programs that encourage - and fund - nutrition services personnel to collaborate with principals and teachers.**

## **Acronyms**

**DOD- Department of Defense**

**CAFF- Community Alliance with Family Farmers**

**CFNP- Community Food & Nutrition Program**

**CFP- Community Food Projects**

**CSA- Community Shared Agriculture**

**FSMIP- Federal-State Marketing Improvement Program**

**FPC- Food Policy Council**

**GROWN Locally- Goods Raised Only With Nature**

**HHS- Department of Human Health & Services**

**NSLP- National School Lunch Program**

**OCS- Office of Community Services**

**OGC- Organically Grown Company**

**ODA- Oregon Department of Agriculture**

**ODE- Oregon Department of Education**

**OSD- Office of Sustainable Development**

**PPS- Portland Public Schools**

**REAP- Research, Education, Action & Policy**

**RFP- Request for Proposals**

**SARE - Sustainable Agriculture Research & Education**

**SB- Senate Bill**

**USDA- United States Department of Agriculture**

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# Local Lunch Resources

## Farm to School

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The following is a list of websites and online documents the Local Lunches team found helpful:

### Farm to School Examples

Community Alliance with Family Farms  
[www.caff.org](http://www.caff.org)

Connecticut State  
[www.ct.gov/doag/cwp/view.asp?a=2225&q=299424](http://www.ct.gov/doag/cwp/view.asp?a=2225&q=299424)

Fresno Metro Ministry  
[www.fresnometmin.org/cvf2s/index/html](http://www.fresnometmin.org/cvf2s/index/html)

GROWN Locally  
[www.grownlocally.com](http://www.grownlocally.com)

Selling to Institutions: An Iowa Farmer's Guide  
[www.iowafoodpolicy.org/ifcpublications.htm](http://www.iowafoodpolicy.org/ifcpublications.htm)

Wisconsin Homegrown Lunch  
[www.reapfoodgroup.org/farmtoschool](http://www.reapfoodgroup.org/farmtoschool)

Washington State Department of Agriculture  
[www.agr.wa.gov/Marketing/SmallFarm/](http://www.agr.wa.gov/Marketing/SmallFarm/)

### Farm to School Information & Guidance

Bringing Small Farms and Schools Together  
[www.fns.usda.gov/cnd/Lunch/](http://www.fns.usda.gov/cnd/Lunch/)

Center for Ecoliteracy- Rethinking School Lunch  
[www.ecoliteracy.org](http://www.ecoliteracy.org)

Center for Food & Justice  
<http://departments.oxy.edu/uepi/cfj/>

Farm to School: "Eat Smart-Farm Fresh"  
[www.fns.usda.gov/cnd/Lunch/](http://www.fns.usda.gov/cnd/Lunch/)

Food Routes: Educational Materials for Fresh, Local, Seasonal and Regional  
[www.foodroutes.org](http://www.foodroutes.org)

From Farm to School: Improving Small Farm Viability and School Meals  
[www.cfap.org/afs\\_temp3cfm?topicID-245](http://www.cfap.org/afs_temp3cfm?topicID-245)

Leopold Center  
[www.leopold.iastate.edu](http://www.leopold.iastate.edu)

Local Food Connections: From Farms to Schools  
[www.extension.iastate.edu/Publications/PM1853A.pdf](http://www.extension.iastate.edu/Publications/PM1853A.pdf)

# Appendix A

## Expanded Farm to School Examples

### Washington Department of Agriculture's Small Farms and Direct Marketing Project

Washington's Small Farms and Direct Marketing Project began with an internship opportunity that allowed Kelli Sanger to explore new markets for farmers. After Sanger's initial research, the department applied for a Risk Management grant from the USDA and the project began in 2001. Today, Washington's general fund supports the project.

The Small Farms and Direct Marketing Project has held forums, published a resource guide for farmers, and conducted farmer surveys. Their program seeks to help farmers make connections to sell their products. The program is now part of a larger program focused on connecting small farms to restaurants, institutions, and other retail locations.

Farmers and schools in Washington State have started to work together. Due to the popularity of school gardens and tight school budgets, food service directors want more variety, but they find it hard to work directly with farmers.

Sanger says that the ability to get a unified message across the table is crucial. She has been in this position for four years and has successfully spread the word about direct marketing opportunities for farmers. Now, Sanger reports that people come to her for information, and she has been flexible enough to get into the buyers' and sellers' worlds. Most importantly, Sanger reports that Washington's program has excelled in building capacity among advocates. Involving all sides of the community, including farmers and food service directors, is critical for a community to find a local instigator.

A major obstacle has been that the Department of Education and

School Food has not been able to participate. Time and funding concerns have overloaded both the Education and Agriculture departments. The state has not used the DOD funds because they require the Department of Education's cooperation.

Sanger suggests that agencies with a stake in child nutrition need to collaborate in order to make change happen. To make connections with suppliers, interested parties should go to the industry fairs and highlight the benefits and obstacles and spread the word about how successful other programs have been.

### Olympia School District

The Olympia School District in Washington established its Farm to School program, which includes serving organic and local produce in a salad bar at each school, in response to several things. The school district was concerned about the growing trend of child obesity and lack of proper nutrition and fitness among children. Because the federal government had increased the reimbursement rate for school lunches, which increased the budget available for the school to fund local and organic food choices, the school board was able to look at the menu to identify ways for improvement.

At the same time a group of parents and teachers at Lincoln Elementary called for more nutritious offerings, including organic food, at their school. Washington's Department of Agriculture had sent out information about Farm to School programs that identified steps for implementation and the district chose to start with a pilot program at Lincoln Elementary, where it added a salad bar with organic choices. Fifty percent of the items on the salad bar were organic. The media publicized the organic choice salad bar and other schools learned that Lincoln had this option. Today, all eighteen schools offer the Organic Choice salad bar.

The district started by purchasing from one farmer but now purchases



from seven farmers that supply all eighteen schools. The farmers have organized around the program. In seven to ten years, the farmers may be able to supply all of the volume the district needs. The district found that most farmers already had established markets of CSAs, co-ops, and farmer's markets and were easily able to incorporate the school district into their distribution system. The district has a central kitchen and receives its orders once a week.

The school district found that it had to give the farmers advance notice to get produce out of the ground in time for delivery; when the district worked with distributors it could order potatoes one afternoon and get 1,000 pounds the next morning. The district needs to refine its system in order to work directly with the farmers. In response the farmers have started planting specific crops that look better and taste better according to student standards. One farmer the school worked with switched from bitter greens to leafier greens that are more appealing to the children.

The food service director at the district, Paul Flock, strongly supports buying local food. He saw that most of the revenue spent on lunches was leaving the region and state. By working on a local level with farmers, he believes school districts can have more productive price negotiations. One farmer approached Flock when gas prices began to rise with concern about the need to raise the price of his goods to reflect the change in gas. They worked out a price that was reasonable for both the farmer and the school district.

The district uses no outside funding for the program. It cut out dessert, eliminated its contract with Domino's Pizza, and raised the price of lunch for students and faculty. It also shifted its resources. Right now, the district spends \$100,000 on produce. Fifty percent of the school's produce is organic and ten percent is local. Flock's goal is to purchase fifty percent of its produce from local growers.

Every school district in Washington State gets some money from the Department of Defense (DOD) to purchase commodities. Olympia School District receives \$125,000 from DOD. The district can use \$25,000 of this amount for produce as long as the produce is U.S. grown.

The biggest obstacle the district has faced in implementing its program is the fear of the unknown. Once the farmers were on board, the district could purchase from them just like any other vendor. At first, the staff was reluctant to support the program because it required changes. Students complained when the school first introduced organic produce because it looks different than the conventional produce that was previously sold in schools, which led the staff to want to switch back. The district decided to wait and found out that it was just a matter of time until the kids got used to it and loved the food.

Flock worried about how to manage the costs associated with the new program. Organic greens cost \$4.00 per pound while iceberg lettuce costs \$0.99 per pound. He found that the more expensive food is worth the price because it offered more nutritional value.

Flock thought the program would create concerns about food safety, but their worries turned out to be irrelevant. The farmers were already addressing food safety issues in order to be able to sell their products in other markets. The district was also concerned about distribution, which turned out not to be problem because the farmers deliver to the school.

The district has had overwhelming support from its community. The key to this support was to start the program by having one school with very involved people and then expand the program to other schools. Within one year of when the program started, all elementary schools in the district had the Organic Choice salad bar. Within two years, all secondary schools offered the salad bar. All eighteen schools in the district offer the salad bar today.

## **GROWN Locally Farmer's Cooperative**

GROWN (Goods Raised Only with Nature) Locally is a cooperative of about 16 members and a CSA located among farming communities in the northeastern corner of Iowa. Its mission is to “foster the diversification and success of farms by supplying fresh, local, naturally-grown food products to the food service industry.” GROWN Locally members believe in feeding their communities; the farmers directly serve families and institutions, benefiting both.

Michael Nash, a farmer who organized the cooperative, believes that for institutional selling to work, farmers must be confident in their product and food service directors must genuinely want to provide good food. Farm to School programs, Nash points out, are institutional selling arrangements from the farmer’s perspective. If a farmer can sell to a school, he or she can sell to nursing homes, restaurants, churches, hospitals, and other kinds of institutions. Nash believes that the only way for farmers to understand how to work with institutions is to talk to them to find out how they like to order, how they want the product delivered, when they want it, and how often they want it. GROWN Locally operates like a distributor. Nash believes they have created a replicable model. GROWN Locally began in 1998 out of concerns among a group of local farmers about the food system. These farmers were concerned about statistics showing the following:

- The average food item in the U.S. travels 1,300 miles before someone eats it;
- Only 3 percent of the farms in the U.S. supply 75 percent of the nation’s food; and
- Farmers located in the San Joaquin Valley in California produce 90 percent of all fresh vegetables consumed in the U.S.

Organizing the cooperative was simple. Nash just asked fellow farmers if they were interested in combining resources and entering institutional markets. The farmers who met in Nash’s barn wanted to diversify their markets. Some of the farmers had never grown vegetables before. Instead, they had been strictly commodity farmers growing corn and soybeans for export. When they looked for an alternative to commodity farming, they could not find any models. They found that state and federal agencies were more interested in commodity farming and exports rather than changing agricultural practices.

When GROWN Locally talked with food service directors, the directors expressed a desire to serve memorable food. An example would be potato salad, which food service directors need cubed potatoes to make. GROWN Locally won a USDA grant that supported the production of specialty products, and they used this grant to create value-added products. Now, the cooperative has a processing facility. For the first year, the cooperative has operated the facility twice a week, allowing them to deliver the cut potatoes the next day. The cooperative would like to start freezing produce, also. The potato salad has been a hit with the fresher potatoes, which is important to nursing homes and hospitals that compete based on service.

Nash points out that cooperative farming appeals to farmers who want an alternative. New growers join the cooperative because GROWN Locally offers a support system. Converting production methods to meet institutions’ needs requires investments, and the cooperative helps with this transition. To supply value-added produce, the farmers must wash, pack, and transport the food in a refrigerated truck. The farmers in the cooperative have pooled their resources to meet these needs. They also learned they needed to try to grow more in the fall and spring.

GROWN Locally received a USDA SARE (Sustainable Agriculture



Research and Education) producer grant to explore options that assist their customers with ordering. With the grant, they created a website where institutional customers can order. The same website allows families to sign up for CSA shares. The website now allows families to order various amounts of specific produce. Thirty-five to 40 percent of GROWN Locally's sales to families are custom orders. The cooperative anticipates serving 250 families this year. The cooperative is not yet profitable, and most farmers have an outside job.

### **Homegrown Lunch, Madison, Wisconsin**

The goals of Wisconsin Homegrown Lunch are to enhance Madison public schools' meal programs by introducing fresh, nutritious, local and sustainably grown food to children, beginning in the city's elementary schools. The program provides an opportunity for children to reconnect with their natural world while helping to establish a new market for local farmers and processors. Wisconsin Homegrown Lunch is a joint project of the REAP Food Group, a farm advocacy organization, in collaboration with Madison educators, school food service staff, and local food producers.

The program is in its fourth year and focuses on the Madison School District. Currently, three elementary schools are participating with plans to begin a pilot program at a secondary school. The program includes fresh food tasting, farm presentations and field trips.

Wisconsin Homegrown Lunch originated as an effort of the REAP food group. Some of the REAP members were parents with children in the Madison School District who wanted school lunches to be supplied by local produce. They started with pilot meals but at first found it difficult to change the school lunch. They have been more successful with the educational aspects of the program, such as teaching children about the benefits of local food.

Wisconsin Homegrown Lunch took advantage of many different ways to connect with local farms, but this also has been one of the biggest challenges of the program. The University of Wisconsin's Center for Integrated Agricultural Systems, which focuses on sustainable food practices and agriculture, is a partner in the program. Through their farm-to-college program they had developed relationships with farmers that Homegrown Lunch was able to tap into. Trips to local natural food stores and co-op's also have proven to be a useful way to identify willing farmers, and they have been lucky to connect with CSAs and other farms that are not interested in wholesaling.

The Madison School District utilizes a central kitchen to supply all 47 schools. At first, finding a certified kitchen to process food was a challenge and a necessity. Since the district does not have many processing capabilities in the central kitchen, they have collaborated with a local natural food store to use their processing facilities.

The schools involved in this program have been able to use existing funding sources. They have been able to establish buying policies and request unique products, and change the way they evaluate proposals to include criteria like whether the farmer can come and provide an educational program, such as a harvest time event. Over half of the criteria still focus on price, but asking for educational opportunities has created opportunities for the school to integrate local foods. This type of policy is driven by the school district unless state policies exist. The district also has been able to use DOD Fresh dollars. Some schools have moved a portion of their federal dollars into the program to purchase from certified local farms.

A Sustainable Agriculture Research and Education (SARE) grant from USDA, which has been administered by the University of Wisconsin, fund the program and staff position at the Center for Integrated Agricultural Systems.

## **Grower's Collaborative, Davis, California**

As a farmer-run organization, The Community Alliance with Family Farmers (CAFF), a membership based, non-profit organization headquartered in Davis, California, focuses on creating distribution networks that school nutrition directors can use to purchase their produce from local farms conveniently and within budget. The alliance aims to make the purchase of more fruits and vegetables a sustainable economic choice for financially strapped school districts. CAFF organized farmers into Grower's Collaborative, a non-profit, which has recently become an LLC and will soon carry needed liability insurance of \$2 million.

CAFF's Farm to School program, which started in Davis Unified School District, works with school nutrition directors to build purchasing schedules that take advantage of seasonal shifts in produce. It also builds not-for-profit distribution centers specifically to supply local schools by finding cost-effective ways to bring fresh food into the cafeteria with minimal processing and minimal transport. The program has partnered with other organizations that have similar infrastructure needs, such as food banks and community gardens, to share storage space and cut overhead costs. CAFF contracts out their processing needs to local processors, which are plentiful in California. It was more cost-effective for the program to outsource the processing than to try to gain the infrastructure and expertise needed.

The main objectives of CAFF's Farm to School program are:

- Increase access to fresh fruits and vegetables for low-income school districts (typically above 65% of students eligible for free and reduced-price school meals),
- Reduce the 'food miles' of food served in California cafeterias by using locally-grown food, and
- Serve a wider variety and greater quantity of fresh fruits and vegetables in California cafeterias.

Most of the districts in which this program operates have marginalized, low-income students and a disproportionately high percentage of minority students. However, CAFF will serve any and all schools that are ready to get more fruits and vegetables into their cafeterias.

CAFF has received a USDA Value-added grant, from the royal development program. Anya Fernald, CAFF organizer, feels they have been able to get these grants because they are an advocacy group with a 26 year history of representing small farmers. The value added grant allows funding for business planning efforts for one year up to \$100k, and for implementation and capital costs for one year up to \$100k, all requiring matching funds from outside sources. They have also applied for USDA SARE grant funding. Growers Collaborative is now self-sustaining and connects approximately 40 farms with 40 school districts. Outside funding sources have come from California Food and Fiber Futures, California Nutrition Network, Orfalea Family Foundation, and Ventura County Farm Bureau, to name a few.

CAFF found that distribution networks were the missing piece and have operated as a distributor, forming Growers Collaborative, LLC, a separate entity that will carry liability insurance to cover participating farmers. They are expanding their model to Sacramento and Santa Cruz and have a commitment from Bon Appetite, another distributor, to purchase a minimum of 20% of their produce from Grower's Collaborative, which will help provide a dependable revenue stream.

CAFF's approach to school nutrition directors has been for incremental change, by first suggesting replacing produce on salad bars. They have been successful by not trying to revolutionize school lunch but trying approaches that require minimal intervention from schools that works within their budgets.

## Bend-LaPine School District

Bend schools have integrated local produce into school meals and are starting to put local range beef and lamb into the meals. The programs mesh with the schools' gardening and recycling programs and with the school's desire to confront the crisis in child nutrition.

The program started in the summer of 2005 with the summer lunch program, which fed about 3,000 students. Bend now supplies up to 15,000 meals a day during the school year. At best, the local produce can only supplement, not supply their entire demand. While it started with adding local food in the summer, they now have local veggies through the end of December and local fruit through the middle of February. Farmer Jeff Rosenblad of Happy Harvest Farms indicated that by the 2006-07 school year he would be able to supply food to the school district year round. He has invested heavily in infrastructure that will make this possible.

Katrina Wiest, the Wellness Specialist for the school district, already had connections with farmers through her position as manager of the Bend farmers market. Using her wholesale produce list, she went to the farmer's market vendors and asked if they could beat the wholesale prices. In many cases, they were able to and she began planning her menu according to what was available. Delivery was scheduled for the same days as the farmers market, allowing the farmers to make one trip.

While Bend School District uses DOD dollars coupled with existing funds, the small number of vendors able to take DOD funds has challenged the district. The district spent about \$100,000 on produce last year; DOD supported about 35% of that purchase. Often, schools can buy local food at a per unit price rather than per pound, increasing the amount of food the school has to use. This is particularly true if the local product is of very high quality and is large.

## Connecticut

The Connecticut Department of Agriculture works with 41 school districts, 5 schools, 39 farmers, and 6 wholesalers. The department has helped schools integrate locally-grown produce into school meals and has plans to expand into local meats, eggs, and dairy products. The department works collaboratively with Connecticut's Departments of Public Health, Education, and Environmental Protection. In addition to this multi-agency support, the program has the full support of the state legislature.

Rick Macsuga, from the Department of Agriculture, believes that buying local is important because it keeps money in the local economy. Macsuga believes the department is helping farmers that might not be able to survive without this new market. The program allows farmers the opportunity to connect with new customers. It has also developed the CT Grown logo found on price cards in the lunch line.

Wholesalers have started to seek out Farm to School programs they can participate in by contacting the Department of Agriculture. The department has been able to create distribution networks with these wholesalers. School food service directors have also approached the Department of Agriculture because it has reached out with information about Farm to School programs. The department brings together school nutrition directors and farmers to help create networks for new markets. For example, the department has sponsored events that bring the food service directors out to the farm to feed them lunch on site while teaching them about how the farm runs.

Macsuga notes that all school systems are different and that one plan will not work for all schools. He recommends that states seeking to launch efforts should try to be conscious of the needs of wholesalers and food

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service directors. Ultimately, if a nutrition services department wants to implement a Farm to School program, it will be able to. In Connecticut, the program's wholesalers started to request more farmers to work with, building the program's capacity.

Connecticut's biggest challenge has been how schools purchase products. Macsuga indicates that the programs work because schools can buy direct from farms and farmers get a better price for their product. The product is cheaper and higher quality. On the other hand, the program has been limited in what items the schools can purchase. For example, very few local farmers grow carrots because they can't compete with farmers on the west coast and in Canada.

While some schools are able to use DOD funds, they do not work well in Connecticut, due to it being a small agricultural state, and this program does not use them. Instead, funding comes from the state's general fund through the Community Reinvestment Act 228. Also, the state won a Federal State Marketing Improvement Program (FSMIP) grant from USDA that has helped fund the program.

# Appendix B

## Oregon Law Regarding Procurement

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Oregon law establishes three tiers of procurement procedures, although local school districts may have stricter requirements than the state.

Under Oregon law:

- School districts may use small purchase procurement methods when total annual purchases from a single company are under \$5,000.
- School districts may use an intermediate procurement method for purchases between \$5,000 and \$150,000. For the intermediate procurement method, school districts must request three informal price quotes or RFPs and select the proposal that “best serves the interests of the contracting agency.”
- For purchases over \$75,000, the proposals must be written rather than verbal. For purchases over \$150,000, districts must use formal competitive bidding or RFP procedures.

School districts may not intentionally divide purchases in order to comply with these thresholds.

Procurement rules prohibit school districts from using in-state or local geographic preferences, failing to adequately advertise or solicit prices, or allowing conflicts of interests to occur. These requirements mean that school districts must follow rules to purchase local produce, but they also create opportunities for schools to purchase local food from farmers and from their normal food distributors. For example, the small purchase procurement method allows school districts flexibility when they make very small food purchases, and the RFP method allows school districts to consider quality in addition to price when they purchase food.

# Appendix C

## Funding

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We have identified several major funding sources for various stakeholders interested in establishing Local Lunches program.

### Federal Grants:

#### USDA Risk Management Grant: Value-added Program

**Brief description of program:** The Rural Business-Cooperative Service of the USDA offers grants to help independent producers access infrastructure needed for value-added activities. Farmers have used these grants to create food-service-ready produce for schools. Applicants must provide matching funds at least equal to the grant amount.

**Who can apply:** The grant is available to independent producers, producer owned corporations or partnerships, and cooperatives.

**What types of projects have been funded:** Grants may be used for planning activities and for working capital for marketing value-added agricultural products and for farm-based renewable energy. The aforementioned groups can use these grants for business planning and implementation, such as paying for the legal expenses needed to organize a corporation, but cannot use grants to purchase equipment.

**When can you apply:** Annually

**Ranges of grants:** up to \$300,000

**Contact information:** <http://www.rurdev.usda.gov> or [www.grants.gov](http://www.grants.gov)

#### USDA Community Foods Project Competitive Grants Program

**Brief description of the program:** The Community Food Projects (CFP) Competitive Grants Program provides the major funding source for community-based food and agriculture projects in the U.S. Approximately \$5 million in funds will be available in 2006.

**Who can apply:** These grants are intended to help eligible private nonprofit entities that need a one-time infusion of federal assistance to establish and carry out multipurpose community food projects.

**What types of projects have been funded:** Projects that help meet the food needs of low-income people; increase the self-reliance of communities in providing for their own food needs; and promote comprehensive responses to local food, farm, and nutrition issues.

**When can you apply:** Annually

**Ranges of Grants:** Projects are funded from \$10,000-\$300,000 and from 1 to 3 years.

**Contact information:** [http://www.csrees.usda.gov/nea/food/in\\_focus/hunger\\_if\\_competitive.html](http://www.csrees.usda.gov/nea/food/in_focus/hunger_if_competitive.html)

#### USDA Sustainable Agriculture Research and Education (SARE) Grant

**Brief descriptions:** SARE is a USDA competitive grants program supporting agricultural projects that increase knowledge about practices that are profitable, environmentally sound, and good for people and communities.

They offer grants for professional development, producers, on-farm research and research and education. Graduate students, community development practitioners, and agricultural educators conducting on-site research at farms can apply for grants in some SARE regions.

**Who can apply:** USDA awards grants to researchers, agricultural educators, farmers, ranchers, and students in the United States.

What types of projects have been funded: Research and education grants fund projects that usually involve scientists, producers, and others in an interdisciplinary approach. Professional Development Grants spread the knowledge about sustainable concepts and practices; these projects educate Cooperative Extension Service staff and other agricultural professionals. Producer grants typically run between and support producer research, marketing and demonstration projects that share the results with other farmers and ranchers.

**When can you apply:** Various annual deadlines depending on specific grant.

**Ranges of grants:** Professional Development Grants \$1,000 and \$15,000 Research and Education Grants usually range from \$30,000 to \$150,000

**Contact Information:** <http://www.sare.org/grants/index.htm>

## **USDA Federal State Marketing Improvement Program (FSMIP)**

**Brief description:** The Federal-State Marketing Improvement Program (FSMIP) provides matching funds to State Departments of Agriculture and other appropriate State agencies to assist in exploring new market opportunities for food and agricultural products, and to encourage

research and innovation aimed at improving the efficiency and performance of the marketing system.

**Who can apply:** State Departments of Agriculture and other appropriate State agencies.

**What types of projects have been funded:** Proposals may deal with barriers, challenges or opportunities manifesting at any stage of the marketing chain including direct, wholesale, and retail. Proposals may involve small, medium or large-scale agricultural entities but should potentially benefit multiple producers or agribusinesses. Proprietary proposals that benefit one business or individual will not be considered.

**When can you apply:** Annually

**Ranges of grants:** Average grant is \$50,000

**Contact Information:** <http://www.ams.usda.gov/tmd/fsmip.htm>

## **National Institute of Health, School-based Interventions to Prevent Obesity**

**Brief description:** This grant program encourages academic institutions and school systems to partner together to develop and implement controlled, school-based intervention strategies designed to reduce the prevalence of obesity in childhood. This initiative also encourages grantees to evaluate the effectiveness of their approach.

**Who can apply:** For profit organizations other than small businesses; State governments; Private institutions of higher education; County

governments; Public housing authorities/Indian housing authorities; Nonprofits having a 501(c)(3) status with the IRS, other than institutions of higher education; City or township governments; Independent school districts; Nonprofits that do not have a 501(c)(3) status with the IRS, other than institutions of higher education; Native American tribal governments (Federally recognized); Small businesses; Public and State controlled institutions of higher education; Special district governments; and Native American tribal organizations (other than Federally recognized tribal governments)

**What types of projects have been funded:** (1) Curriculum changes designed to improve knowledge of healthy food choices and active lifestyles, and behavioral modification programs designed to attain healthy diets and active lifestyles. Specifically, this initiative encourages academic institutions and school systems to work together to develop and implement behavioral interventions designed to increase children's physical activity and/or decrease the amount of time that children devote to sedentary activities, such as watching television or playing computer games. Such interventions might involve curriculum changes coupled with periods of increased physical activity, before, during or after school. Interventions also might be designed to induce and maintain long-term behavioral change regarding eating habits, food choices, exercise habits, and lifestyle. (2) Evaluations of various controlled dietary interventions would also be responsive to this program announcement, for example, changes in school food service programs for school breakfast and/or school lunch. Intervention programs designed for parents who prepare their children's lunches would also be responsive.

**When can you apply:** Multiple recipient dates.

**Ranges of grants:** Applications requesting up to \$250,000 per year in

direct costs must be submitted in a modular grant format. The modular grant format simplifies the preparation of the budget in these applications by limiting the level of budgetary detail. Applicants request direct costs in \$25,000 modules.

**Contact Information:** <http://grants.nih.gov/grants/guide/pa-files/PA-04-145.html>

### **The Office of Community Services (OCS) within the Administration for Children and Families housed in the Department of Health and Human Services (HHS), Community Services Block Grant Discretionary Awards-Community Food and Nutrition**

**Brief description:** To provide for community-based, local, statewide and national programs which: (1) Coordinate existing private and public food assistance resources to better serve low-income populations, whenever such coordination is determined to be inadequate; (2) assist low-income communities to identify potential sponsors of child nutrition programs and initiate new programs in underserved or unserved areas; and (3) develop innovative approaches at the State and local level to meet the nutritional needs of low-income individuals.

HHS provides this funding under the Discretionary Grants for the Community Food and Nutrition Program (CFNP). HHS released the last grant in April 2004, although the department set the last deadline for June 2004. CFNP's main objective is to link low-income people to food and nutrition programs. The OCS views CFNP as a capacity-building program rather than a food delivery program.

**Who can apply:** (1) Formula Grants: Formula grants are awarded to

Community Services Block Grant recipients in each of the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, Guam the Virgin Islands, American Samoa, and the Northern Mariana Islands. (2) Direct Grants: The Secretary of Health and Human Services is authorized to make direct grants to State and local public and private nonprofit agencies with a demonstrated ability to successfully develop and implement nutrition-related program activities.

**What types of projects have been funded:** (1) States receive Community Food and Nutrition funds for Statewide Community Food and Nutrition initiatives, which must be sub-granted to eligible agencies. (2) Federal funds are competitively-awarded to eligible agencies for statewide and local program activities which address one or more of the above objectives and also include outreach and public education efforts designed to inform low-income individuals and displaced workers of the nutrition services available to them under the various federally-assisted nutrition programs. Of the amounts appropriated, 60 percent is for allotment by statutory formula to eligible agencies for statewide programs, and 40 percent is available for competitive awards to eligible agencies for local and statewide programs. (3) Projects must result in direct benefits targeted toward low-income individuals as defined in the most recent “Annual Update of Poverty Income Guidelines,” published in the Federal Register. (4) Projects are normally funded for 1 year and each project will have an expiration date; however, at the Director’s discretion, competitively awarded grants may support projects for shorter or longer periods, i.e., up to 17 months. (5) States may not use their formula grant supplement for State-level administrative costs.

**When can you apply:** (1) Formula Grants: None is applicable for formula grants. Grants are awarded anytime during the fiscal year in which the recipient submits his or her application. (2) Direct Grants: Applications must be submitted within the time frame published in the Program Announcement.

**Ranges of grants:** (1) Formula Grants: \$715 to \$363,440; \$182,078; (2) Direct Grants: \$50,000.

**Contact Information:** [http://www.federalgrantswire.com/community\\_services\\_block\\_grant\\_discretionary\\_awardscommunity\\_food\\_and\\_nutrition.html](http://www.federalgrantswire.com/community_services_block_grant_discretionary_awardscommunity_food_and_nutrition.html)

## Private Foundations:

### W.K. Kellogg Foundation

**Brief description:** The Food Systems and Rural Development program at the Kellogg Foundation fills a programming niche identified by the W.K. Kellogg Foundation’s 2005 Annual Report and a few other major foundations. Rural development grants support comprehensive, collaborative, and integrative efforts of people, organizations, and institutions. Together, these grants seek to create social and economic opportunities that lead to healthy rural communities and improvements in the lives of rural residents.

**Who can apply:** Any 501 (c) 3 or 509 (a) organization

**What types of projects have been funded:** Food system grants focus on catalyzing efforts that lead to a safe, wholesome food supply for this and future generations while ensuring that food production and food-related business systems are economically viable, environmentally sensitive, sustainable for the long-term, and socially responsible. Rural development grants support comprehensive, collaborative, and integrative efforts of people, organizations, and institutions. Together, these grants seek to create social and economic opportunities that lead to healthy rural communities and improvements in the lives of rural residents.

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***When can you apply:*** Ongoing deadline

***Ranges of grants:*** They have not established (nor do they track) maximum or minimum dollar amounts, but rather look at the amount needed for each specific project based on scope of work and expected outcomes.

***Contact Information:*** <http://www.wkkf.org/default.aspx?LanguageID=0>



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