

Step 3: Prepare Marketing Packet and Bid Documents - Completing Product Availability and Pricing Forms

When a school or district is ready to purchase local foods, they may prepare a Request for Quotations (RFQ) or Request for Prices (RFP) for prospective farmers and vendors to complete and return in order to be considered. RFQs or RFPs may include a letter describing the bidding process, a product availability and pricing form, and a vendor questionnaire so school customers can learn more about your farm business. If used, a product availability and pricing form may list the varieties, quality standards, and/or condition/description of the local products the school or district seeks to buy.

- Most forms will allow space for you to include additional items that you produce and may be of interest for school food service. New guidance from the USDA Food and Nutrition Service allows schools to “prefer” local products. Although price may be more of an issue for some processed local products (peeled, sliced, diced, cut, chopped, ground, dried/dehydrated, washed, bagged, butchered and pasteurized), be sure to mention these products to prospective customers.
- Indicate an accurate count and pack for items you produce; elementary schools in particular may be a great way for you to market “seconds” or smaller products like apples or potatoes that are better suited for younger school children.
- Schools are used to purchasing US Fancy or No.1 grade products from their typical distributors. Be sure to indicate all the quality standards for all products you are interested in marketing to schools; if schools are going to process the local products they purchase, they may not require Fancy or No. 1 quality. *Wholesale Success: A Farmer’s Guide to Selling, Postharvest Handling, and Packing Produce*, provides descriptions of grades for a variety of fresh fruits and vegetables and is available for a cost at www.familyfarmed.org/retail.html. USDA Grade Standards are freely available online at www.ams.usda.gov/standards/stanfrfv.htm.
- In order to plan their menus in advance, most school food service directors will want to know how long through the school year they can purchase a certain product. To complete a product availability and pricing form, list as accurately as you can projected quantities and months available for all products.
- Schools understand if you require a minimum delivery to make a sale worth your while. Don’t be afraid to require a minimum delivery quantity or dollar amount if schools make smaller orders or if the schools’ delivery sites are far from your regular delivery routes.
- If upon review and evaluation a school food service director is satisfied with your submitted bid or quote, the product availability and pricing form may become



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your agreement or contract if both you and the school food service director sign and date it. Before your first sale, have a face-to-face conversation with your new customer to ensure that you are both on the same page about expectations. Use the previous “School Food Service Questionnaire” to help you ask the right questions and guide the conversation.



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Step 3: Prepare Marketing Packet and Bid Documents - Sample Product Availability and Pricing Form

Name of Vendor and Contact Information: _____

Signature: _____

Date: _____

Please fill in count, packaging, price, and/or minimum delivery. List additional products and/or varieties you would like us to consider.

Product	Count	Variety	Quality	Packed	Condition/Description	Price	Projected Quantity	Minimum Delivery	Months available
Apples		Any variety	US Fancy or US No. 1		Ripe, firm, crisp, juicy, smooth skin free of blemishes, bruises & scars. Color typical of variety. Washed.				
Asparagus		Spears	US No. 1		Spears to be bright green, free from woody stalks and discoloration. Straight stalks free from decay and wilt. Washed.				
Potatoes		Russet or Round White	US No. 1		Firm and smooth, (not wrinkled); free of soft and/or dark spots, cut surfaces and greenish color. Loose dirt removed. Washed.				
Winter Squash		Butternut	US No. 1		Firm and smooth, (not wrinkled); free of soft and/or dark spots, and cuts. Caramel color skin with orange/yellow flesh. Washed.				

Upon review and evaluation, this bid has been awarded by the School Food Authority.

School Food Authority Signature: _____

Date: _____



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Step 3: Prepare Marketing Packet and Bid Documents - Sample Vendor Questionnaire

Name: _____

Address: _____

Phone and/or email: _____

Are you willing to deliver to more than one location?

☐ Yes

☐ No

Amount of liability insurance coverage (provide copy of policy): _____

Other current local customers and contact information: _____

Payment terms and expectations (receipt must be left at each delivery, one statement to be paid to vendor, etc.): _____

List inspections your facility receives from USDA/State/Local Inspectors and their frequency (annual, bi-annual, etc.), and attach copies of latest inspection report(s):

Please describe your pest management practices: _____

Credit/return policy for poor quality: _____



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Are you available to visit school(s) and talk with students about how your product is grown?

☐ Yes

☐ No

Is your farm available for student field trips?

☐ Yes

☐ No

Vendor's Signature

Date

School Food Authority Signature

Date



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Step 3: Prepare Marketing Packet and Bid Documents - Sample Evaluation Criteria for Selecting Vendors

Schools may use criteria like the following to determine which farmers or vendors are awarded bids or purchasing agreements. Be sure to include information about your farm that covers each of these areas in the marketing materials and/or bid packets you submit to schools or districts you hope will become customers.

School/District: _____

Vendor: _____ Date: _____

Criteria	Points
Food quality	
Price	
Taste test results	
Dependability of vendor (references)	
Service after sale	
Delivery schedule	
Payment method and schedule	
Flexibility	
Promotion and/or education programs	
Product liability insurance	
Food safety and sanitation standards	
Other	
TOTAL	

Write justification for award below:
