

Worksheet 2D:

School Nutrition Director Meeting Checklist

Being familiar with the school meal program you want to work with will help you decide how best to approach the School Nutrition Director, communicate effectively, and avoid common pitfalls with new market relationships. You should make an opportunity to meet, learn about their specific needs and requirements, and set some goals for working together. Here are some key points to discuss together:

- ❑ Goals: Understanding their motivations may help you build relationships.
 - What motivates them to do this work?
 - What are their food service program goals? How does farm to school fit in?

- ❑ Products: Ask about their product needs to assess whether your products could be a good fit.
 - What kinds of products are they interested in purchasing locally? How much? How frequently?
 - Which local products have been successful in the past? Which have not been so successful, and why?
 - What products do they commonly purchase? How much? How frequently?
 - Are they open to new products? Seasonal specials, traditional foods, etc.?
 - How are they used to receiving products? Processing requirements? Pack size and standards?

- ❑ Delivery: Ask about their delivery needs to see if your distribution system aligns.
 - Can products be delivered to a central site or do they need delivery to each school site?
 - What are the infrastructure requirements for delivery (like refrigerated trucks, pallets, and loading docks)?
 - What are the current options for delivery days and times?
 - Who is responsible for coordinating deliveries?

- ❑ Sourcing: Ask about their past experiences sourcing through certain market channels.
 - Are they interested in purchasing directly from local farmers or do they prefer to work through a distributor?
 - Where are they currently purchasing foods?
 - What local or regional vendors do they already work with?
 - What local farms have they purchased from in the past?
 - What has their experience been? Anything they would like to do differently?

- ❑ Procurement: Ask about any purchasing details for products you're interested in selling.
 - How much do they typically spend on these products (per purchase and annual)?
 - Can they share some examples of competitive product pricing?
 - When are solicitations issued and how can they be accessed?
 - Do they have vendor requirements outside of the state and federal regulations?
 - Do they have any vendor preferences, such as geographic preference?
 - Is there any opportunity for piloting sales through an informal agreement, such as a micro-purchase?

- ❑ Payment: Ask about their invoicing and payment processes to ensure these work for your farm business.
 - What information requirements do they have for invoicing?
 - What formatting requirements (i.e., computer, handwritten, specific software or platforms)?

- Do they have a standard template they can share?
- How frequently do they require invoicing? (i.e., monthly, upon delivery, etc.)
- How are payments processed? (i.e., vendor account, paper checks, etc.)
- What is the turnaround time for payments? Are there circumstances to be aware of that could cause potential delays?
- Contingencies: Make a plan for addressing the unexpected to reduce risk and maintain good working relationships. Be sure to include communication procedures for addressing the following:
 - Missed or delayed delivery
 - Product quality issues and solutions for addressing them
 - Price changes and market trends
 - Product availability issues due to crop failure, natural disasters, etc.

More Tips for Working Together Effectively:

Remember to be patient—working directly with farmers may be as new to School Nutrition Directors as working with schools is to you! Here are a few things you can do to help jump-start relationship building and build trust:

- Be prepared for your conversation.
 - Come prepared with an overview of your practices and a list of questions to cover with them, to help ensure that the meeting is productive and benefits both of you. We recommend using [Worksheet 2B: School Market Readiness Evaluation](#) to gather relevant information about your farm business.
- Do some market research.
 - Take the time to learn about them by practicing some basic school food vocabulary and reviewing current menus.
- Highlight your brand.
 - Bring along some product to sample—the quality will speak for itself! Also, share any marketing materials you may have developed, so they can get to know you better, support retention for your brand, and see you as a partner in achieving their farm to school goals.
- Share your expertise.
 - Be proactive in sharing information about your operational cycles (production planning, planting cycles, product availability, etc.). This will help you find common ground and help support negotiations.
- Never show up unannounced.
 - Always call ahead, make an appointment if possible, and avoid busy times such as during lunch periods (i.e., 10am-1pm).
- Avoid judgement and don't shame school food.
 - Remember, school food service staff have the same goals as your farm: to feed hungry kids and support the community.
- Note that communication is key.
 - Be sure to get direct contact information for all parties involved in the procurement process, ask them what their preferred mode of communication is (email, text, in-person), and establish follow-up actions.
- Recognize that developing trusted relationships takes time.
 - It may be necessary to start slowly and build trust through offering samples, piloting sales, and pulling in support from local food champions at the school. Also, fulfilling your agreements on time and with a quality product builds trust.