



MOUNTAIN VIEW WHISMAN CHILD NUTRITION SERVICES PROCUREMENT SUPPORT SCOPE OF WORK SHARED PLATE STRATEGIES PRODUCED FOR DEBBIE AUSTIN

May 22, 2023

Version 2

Project Goals, Objectives, Activities and Timeline

The overall goal of this project is to support Mountain View Whisman School District Child Nutrition Services to successfully solicit food procurement bids and enhance understanding, systems and protocols for procuring to meet Department farm to school, scratch cooking and other programmatic goals. (June-July 2023, approximately 119 hours)

Objective 1: Provide the following support for formal bid solicitations to complete procurement requirements for contracting food vendors for the 2023-24 school year (June, 2023)

Activities include:

- Commercial/Grocery Bid Solicitations:
 - Frozen, Canned and Dried Goods and Bid Solicitation Creation and Item List Development, review and revision with Client.
 - Providing documentation for announcements, communication and outreach to potential vendors.
 - Requesting quote for advertisement from Mountain View Voice and documenting if it is unreasonably high.
 - Working with Shelly Hausman to post bids, Q&A, announcements, and any necessary amendments to the website.
 - Develop item list based on past usage.
 - Developing Q&A responses for posting and any necessary amendments.

- Bid-Opening - Organizing and keeping records of internal bid-opening meeting with Client.
 - Providing scoring templates and training Client on scoring procedures.
 - Scoring bids with Client participation and approval.
 - Packaging documentation for recommendation to the Board.
- Commodities - Cheeses and Meats for Processing Informal Bid
 - Create informal bid for commodity processing.
 - Develop item list based on past usage.
 - Solicit vendors for quotes.
 - Record Responses from Vendors.
 - Provide recommendation and documentation to Debbie Austin for selection.
- Milk/Dairy, Fresh Produce, Paper & Supplies and Bread/ Baked Goods Formal Bid Solicitations:
 - Bid Solicitation and Item List review and light revisions with Client
 - Requesting quote for advertisement from Mountain View Voice and documenting if it is unreasonably high.
 - Working with Shelly Hausman to post bids, Q&A, announcements, and any necessary amendments to the website.
 - Providing documentation for announcements, communication and outreach to potential vendors.
 - Format fresh produce item list based on past usage and add organic.
 - Developing Q&A responses for posting and any necessary amendments.
 - Bid-Opening - Organizing and keeping records of internal bid-opening meetings with Client.
 - Providing scoring templates and training Client on scoring procedures.
 - Scoring bids with Client participation and approval.
 - Packaging documentation for recommendation to the Board.

Objective 2: Provide technical assistance and resources to enhance understanding, systems and protocols to meet Department Farm to School, scratch cooking and other programmatic goals. (July, 2023)

Activities include:

- Providing guidance and strategic support on nuances of micro, informal and formal purchases and recent updates by USDA.
- Advise on seasonal and local procurement.

Budget

The following budget includes all anticipated direct and indirect costs of delivering the project, including labor, overhead, travel, supplies, etc., at a rate of \$125 per hour.

For the roles described above, we propose the following cost for the project, to be led by Ben Thomas with support from Bid Support Coordinator Tim Wilkinson:

Overall Budget: 119 hours at \$125 hour not to exceed \$14,875

Qualifications

Shared Plate Strategies LLC was formed in 2022 by Ben Thomas, one of California's foremost experts on local procurement and scratch cooking implementation in schools. Shared Plate Strategies evolved from the increasing need from school child nutrition departments for technical assistance to advance their farm to school visions while navigating complex procurement regulations, production processes, and sourcing and logistics pathways. Ben will serve as the lead technical assistance provider and manager for this project. Through Shared Plate Strategies LLC, Ben provides school districts with a robust set of services ranging from planning and facilitation to staff engagement, menu development, supplier onboarding, and development of procurement and tracking systems within state and federal guidelines. All services are customized to the specific needs of each District's Nutrition Services program.

Ben has been working in institutional procurement for 13 years, most recently overseeing the statewide Farm to Cafeteria Program at the Community Alliance with Family Farmers (CAFF) from 2015-2022. During his tenure, the Farm to Cafeteria program at CAFF directly supported more than 200 school districts in California to procure from local farms. Ben has extensive experience in developing and implementing successful bid solicitation processes, having worked with more than 40 districts on more than 80 bid solicitations since 2014. Ben led development of the Bid Generator software to automate the creation of formal bid solicitations for school districts at CAFF that is still in use. He served on the CDFA Statewide Farm to School Subcommittee and was the Sustainable Food Manager for UC Davis prior to CAFF. Ben holds a Bachelor's Degree in Economics with Honors from Siena College in Albany, New York.

Tim Wilkinson joined Shared Plate Strategies to support bid processes for schools, recently completing a full spectrum of bid solicitations with Ben and client Alum Rock Union. Tim has a 20 year career in sales and purchasing, most recently as the USA buyer and operations manager at Lezyne, Inc., a worldwide bicycle accessories manufacturer. Previous to that, Tim has experience developing and documenting operational procedures for new sales teams, existing businesses, as well as creating and developing projects and events. Tim holds an engineering degree from Cal Poly, San Luis Obispo.

Shared Plate Strategies Contact Information

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