



Farm to School Institute: Team Pre-Assessment Instructions

Video Transcript

Original Recording Date:

June 15, 2022

Video Available At:

<https://www.youtube.com/watch?v=ySGiC8gJUK4>

Aubree Roth: Hello these are the instructions for the Montana Farm to School Institute team pre-assessment. So just a few basics to begin, each school district team participating will complete one team pre-assessment. This is a different survey from the individual pre-assessment that you will also receive. The individual pre-assessment should be completed by each individual who was listed on the team's application for the institute and just one survey for the team pre-assessment should be completed for each school team. We want you to work together to answer the questions in the team pre-assessment so that they are as accurate as possible. Please also reach out to the rest of your school community if the people on your team are unable or do not have the information available to be able to accurately answer the questions, but do your best you don't need to spend a ton of time on this pre-assessment but we hope that you will be able to get the information. You will complete this online and all of the instructions and the survey are available on the school teams resource page for the institute, which the url is shown here. The team pre-assessment and the individual pre-assessment surveys are due July 15th.

So let's look at where you can find the information. This is the farm to school institute team resource page, so we can jump down by clicking assessments and you'll see here that we have pre-assessments at the end of the school year we will have post assessments, as well for in May 2023 but right now we're focusing on the pre-assessment so this is divided into the individual and the team assessments. So since this video is talking just about the team assessments we'll look here. This is where the instructional this instructional video will be linked as well as we

have the survey here and then the local food procurement questions spreadsheet, so let's take a look at the survey. The beginning of this survey has your basic information as well as if you have any questions you can contact your farm to school coach that's assigned to your team or you can contact Aubrey Roth. So at the beginning here you will select your team, I'm just going to choose the first one here on the list for our example. The next question asks you about individuals that are beyond who was listed in your team's application that might be supporting farm to schools in farm to school initiatives in your district, so you can put their information here. Please use the example here on how to put their name title and their organization or school. This question asks about the number of students that have participated per grade level or age level in the 2021-2022 school year, so this past school year, in any of your farm to school initiatives. Those could be in the cafeteria the classroom whatever kind of farm to school initiatives you've been doing then please include that here. And then this question asks about what kinds of farm to school activities have been taking place in your school district for the 2021-2022 school year, so again the one that we just finished up, you can select all that apply. So I'm going to select these, if you have one that you do not see here you could put that here. This asks how many school gardens and related school garden types you have so enter a numeric response. I'm going to say one in ground or container garden and that's it for this school district. And then this asks about policies that were in place regarding farm to school during the 2021-2022 school year so select all that apply here. The next two questions are probably the most difficult questions to answer and will definitely need the assistance of your school nutrition program director or head cook whatever their title is and or your business clerk, so the people who are managing food purchases for your school meals and who have the budget information. Give them as much time as possible to answer these questions so I recommend giving them this right away and giving them a couple weeks to work on that. The first question is the total food budget. Now this question we're asking you to round to the nearest dollar don't use any punctuation in your answer and this includes all food purchases including non-local and local foods, so any kind of food that was purchased for the school meals breakfast lunch etc that's what you include here. The local food purchases question has its own spreadsheet which you will use to answer this question and then when completed upload to the survey using this uploader. And then the last question is if you have any other feedback or comments and this is very helpful we will be creating the post assessments based off of these pre-assessments, so expect to see these questions again. And if you have any information or confusion in answering these questions this is a great place to put that. If you do have questions about completing it please just contact your farm to school coach or myself Aubrey Roth so that we can help you rather than reading it in here. Once you're complete then you will click submit and then you will be done. All right so the next part is to look at the local food purchases spreadsheet. I'm going to go over the tips and definitions and notes section which is on the instructions tab which I'll show you in a minute, but let's just go through some basics. Informed estimates are perfectly acceptable however please do not guess based on no data or experience, so if you're someone who does not have any connection with the school meals program you're not probably the right person to complete this spreadsheet. So get that to your school nutrition program director head cook and or your business clerk whoever has

the ability to pull information from the budget and be able to answer the question as accurately as possible given time restraints. There's no need to spend hours on this task, again estimates are fine, informed estimates but just do the best you can with the information and time that is available. So as you can see here um we have set a definition for local for the reporting purposes of this project. In general however schools set their own definition of local and so that could mean within the state, within a certain number of miles, within the county or other definitions and it could be product specific. A definition for your meat may be different than a definition for your fruits and vegetables, so typically you as a school district set your own definition of local. And most schools are often using the within the state of Montana for their definition but again set what makes sense for you, however for this project for our reporting will specifically only be including purchases of items that were grown or raised locally for whole products and contains mostly locally grown or raised ingredients for processed products, and by locally you know we're meeting in general Montana. So you can use that if there's a closer framework that you would like to use you can use that as well. So let's look at some examples um to really understand what that means. So an example one is a marinara um so for a local product the Montana marinara sauce that's processed by mission mountain food enterprise center so it's locally processed. It does contain non-local tomato sauce but it also contains a significant amount of locally grown vegetables and herbs so we would count that as a local product. In a non-local example we have a marinara sauce that was purchased from a grocery store in the town but it doesn't contain any locally grown or raised ingredients, so for the purposes of this reporting that is not local. So another example is bread and baked goods, so a local example would be a bread that contains mostly locally or Montana grown grains and a not local bread or baked good would be one that does not contain locally or Montana grown grains. Throughout this instructional video I'll be providing a few examples such as the Montana marinara that use actual business names and product names. This does not mean an endorsement of these businesses but they are real life examples and hopefully they will better illustrate some of the differences and the definitions. So let's take a look at the spreadsheet. If we're on the institute teams resource page we can download it here. I encourage you to write when you're downloading it change the name add on a team your team name, so I'm gonna say Samplesville school and then we're going to save that. Once you have this spreadsheet open for the local food purchases question the first tab is the instructions tab so this goes over all of the things in this video just more in written form, so great place to reference any of this information. The second tab is the local food purchases tab and this is the one that you'll be using for reporting for the pre-assessment as well as the post assessment if you choose. The third tab is the local food tracker, it is essentially another option you can use in place of or in addition to the local food purchases tab, the second tab that you'll use for reporting. And then this final tab says do not edit, this information is needed for the other tabs to operate so please leave this tab. Each product type for example fruit this pink one has a separate block. As you can see here we have fruit vegetables fluid milk other dairy which is not fluid milk such as cheese yogurt sour cream things like that. Protein includes meats, legumes like lentils chickpeas etc, grains includes baked goods that include local grains and then other for any other things that don't fit those categories and then your total local food purchases down here

at the bottom. Each row within the product block so within our fruit block here includes a different market channel. The market channel is essentially how the items were purchased. Only complete the rows for the data that's available or that purchases have been made in the leave all other rows blank. Don't remove any of these rows and report on all local food purchases made for that market channel type rather than individual purchases. For example one row for local farm in the fruit category would include all the apples strawberries and cherries that your district purchased directly from local farms. So let's talk through each of these market channels. Local farm so the items were purchased directly from a farm ranch or other agricultural food producer, so for example maybe we purchased apples directly from Swanson's orchard. Distributor, the items were purchased from a distributor local regional or national not directly from the producer, so for example if we purchased those same Swanson orchard apples from quality foods distributing instead of purchasing them directly from Swanson's orchard. The next one is food hub, these items were purchased from a food hub not directly from the producer. We don't have a lot of food hubs in Montana but our closest example perhaps is if we purchase those same Swanson orchard apples from Western Montana Growers Co-op. And then USDA foods or DOD fresh. The items were purchased or ordered from the USDA foods or DOD fresh catalog so for example you purchased Swanson orchard apples from DOD fresh. In this case Grasmic produce is the contracted distributor for Montana DOD fresh, however since the apples were purchased through the DOD fresh program they would be counted here in this market channel category. And then unknown, the items were purchased through a different channel listed than above or the market channel is just unknown. If your district does not have the ability to differentiate between the market channels for each product type use the unknown category. So let's look next at this frequently served. You'll select how often the items in the product type through each market channel are served in the school meals or snacks. If multiple food items were purchased in this way estimate an average for the group, for example the district made the following purchases from quality food distributing and served them. Strawberries were served one time apples were served weekly and frozen cherries were served twice this would average to approximately monthly. Don't type in this cell when you click in this cell you'll see a drop down arrow here, you can click that and then you will select your desired amount. The last column here is for the dollar amount so you'll enter the whole dollar amount for that row. Leave that row blank if there are no purchases for that given product type and market channel. The subtotal fields automatically calculate the totals using the formula do not edit the subtotal fields. The total food purchases at the bottom is also automatically calculated so you don't have to do any extra math than what you already did. So let's look at an example here, so for our previous examples where we purchased strawberries apples and frozen cherries from a distributor or various distributors, we decided we the frequency served was monthly because we averaged them out with strawberries being served one time apples being served weekly and frozen cherries were served twice. And then we paid approximately five hundred dollars so now you can see we have five hundred dollars. We also purchased apples from directly from an orchard and we served those seasonally we served them one or two times and we spent four hundred dollars. So now we have the fruit subtotal of nine hundred dollars and as you'll notice we're not doing a row for each of the strawberry cherries apples etc, it's just for

the category of how much do we buy from distributors, how much of fruit did we local fruit did we buy from local farms. So you can move through the spreadsheet in that way if you're looking at protein, so meat there are some distinctions in some of these categories. So you may be purchasing from a ranch or you may be purchasing from the processor, either of those we're counting that as a local farm so you'll put that in here. So let's say we served local beef that we purchased from a processor and we serve that monthly and the total amount for the whole school year was 20,000 dollars. Once we have populated each of those through these categories then we have this amount at the bottom. So once you're done with this spreadsheet you can save it, go back to your survey, click to upload, select your document and it will upload your document and then you can submit. As I said before this spreadsheet is going to be the same one that you use at the end of the 2021-2022 school year, so in May 2023 you'll complete the same spreadsheet. Consider tracking your local procurement data throughout the year to make the reporting easier. The local food tracker tab which is the next tab over is a suggested method you can use for tracking, but it is optional you're welcome to use any other tracking method that works for you. If you do use the provided local food tracker shown here you can submit that instead of the local food purchases tab. You can also do this for the pre-assessment so if for this pre-assessment that's due July 15th you don't want to use this you'd just rather use the local food tracker, either method is fine as long as we get one of these back. The local food tracker is more specific but it may be easier for some people to list out each purchase rather than trying to group them together in those categories. So let's look at an example of how to use this local food tracker spreadsheet. As you can see it comes pre-loaded with an example, so on September 1st 2022 we purchased fresh strawberries, 10 pounds of them from sample farm that's located in Samplesville Montana. The product type is fruit since they're strawberries. So for this we have the drop down so once you click into that cell you'll see that drop down box pop up immediately and then you can select the item. The market channel is again a drop down and it's those same market channels as before so you can refer to the instruction tab for those definitions. We have local farm distributor, food hub, USDA foods or DOD fresh and unknown, so we're going to select local farm. This local food tracker tab also has an ownership column so if you know um if it if this business is minority owned, women owned you can select that here if you don't know just select unknown. Then you're going to select how often this item is generally served and again this is cert the frequency for served not for purchasing, so with this we've purchased them one time but let's say we typically serve them monthly you would select that here. We're going to say they're served seasonally occasionally because fresh strawberries from Montana are not available year-round so we'll say seasonally occasionally and the dollar amount that we spent was 25 dollars. We ask that you complete the spreadsheet to the best of your ability may mean that some of these fields are left blank that is completely fine. Let's do another example. On September tenth we purchased apples, we purchased 100 pounds of them and these ones we purchased from one of the vendors that I used as an example, which was quality foods distributing. They are located in Bozeman and the product type is fruit. The market channel is this is a distributor so we're going to select distributor even though as our previous example for the local food purchases tab was that we're purchasing Swanson's apples but we purchased them through quality food

distributing, so we actually paid quality food distributing not Swanson's directly, so we're going to use quality food distributing as the vendor here. We're going to put that it's distributor ownership we don't know so we're gonna put unknown, um and then the frequency is going to be we're gonna say we are serving the monthly and the dollar amount, this is completely made up is 300 dollars. That's how you can go through this again if there's not that much information let's say you don't actually know their town you can leave a blank, we'll try to look it up. That information helps us determine if it's a different vendor since some of these vendors have very similar names so this will be really helpful for us. So again you can use this spreadsheet and submit this instead. It breaks it down by each purchase which could be kind of tedious but may also be an easier way for you if you're looking at what purchases you made anyway, or you can use the local food purchases which then you need to add up your purchases into these categories or estimate them based on what you know. So if you have any questions or issues you can contact your farm to school coach. You can contact Jay Stag or Robin Vogler, they're both farm to school coaches for the institute and their school nutrition program directors who have many years of experience purchasing local foods and have suggestions on different tracking mechanisms that you can use throughout the school year and different ways that you can find that information. You can also contact myself Aubrey Roth if you have any questions about the assessment or this process. Thank you so much for doing these assessments and in a timely manner. We're really grateful to have you as part of the Montana farm to school institute and look forward to seeing you at the summer retreat.