

## The Purchasing Power of Collaboration

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### ABSTRACT

#### **Purpose/Objectives**

School Food Focus (Focus) developed the Focus Midwest project on the premise that school food professionals (SFPs) could work together to minimize effort and maximize potential to find new or improved products to serve. Focus designed this project as an experiment to explore how and to what extent this collaborative approach could effect changes in the supply chain leading to improvements in public school nutrition.

#### **Methods**

Focus Midwest school food professionals (SFPs) participated in a collaborative process from 2012 to 2015. SFPs representing seven districts in Illinois, Iowa, Michigan, Minnesota, Nebraska, and Ohio agreed on types of products to pursue and developed a joint understanding of desirable food attributes. The SFPs subsequently worked together to access these products by sharing information and specifications, partnering with USDA Foods, and collaborating with manufacturers.

#### **Results**

The Focus Midwest collaboration yielded two important results: 1) SFPs actively improved the quality and availability of items for their own district and on the school food market broadly; and 2) SFPs built a community of practice that provides ongoing learning opportunities, new ideas to improve meal programs, and a safe space to share challenges.

#### **Applications to Child Nutrition Professionals**

The experience of Focus Midwest indicates that through collaboration, SFPs can both achieve tangible procurement successes and develop relationships to support their ongoing efforts individually and collectively.

**Keywords:** school food; school nutrition; food service; procurement; community of practice

### INTRODUCTION

School food professionals constantly seek new and improved items to serve to students. They look for foods that help them meet federal meal pattern regulations, offer improved taste and quality; or are produced in environmentally or economically sustainable ways (Sacheck, Morgan, Wilde, Nahar, & Economos, 2012, Strohbehn & Gregoire, 2001; Yon, Amin, Taylor, & Johnson, 2016). Whatever their rationale, it is often difficult for school nutrition staff to access the products they want via the school food marketplace, because the items they desire are too expensive, are not carried by their distributor, or simply are not produced for institutional

markets (Askelson, Lubker Cornish, & Golembiewski, 2015; Gregoire & Strohbahn, 2002; Landry, Lingsch, Weiss, Connell, & Yadrick, 2015; Motta & Sharma, 2016). In addition, searching for new products is time-consuming. School food staff must determine specifications, identify suppliers, incorporate new items in their operations, and ultimately assess whether students like them.

School Food Focus (Focus), a national collaborative of 45 school districts, developed the Focus Midwest project<sup>1</sup> on the premise that school food professionals (SFPs) could work together to minimize the burden and maximize the potential to find products they would like to serve. Emerging literature and anecdotal evidence show a collaborative approach to be an effective strategy to facilitate procurement change in PK-12 public meal programs (Sacheck et al., 2012). To learn from the Focus Midwest experiment in collaborative procurement change, Focus invested in a rigorous, multi-year, external evaluation (Mavrolas & Rusmore, 2016). As documented by the evaluation, the experience of Focus Midwest indicates that through collaboration, SFPs can both achieve tangible procurement successes and develop relationships to support their ongoing efforts individually and collectively.

Focus Midwest SFPs participated in a collaborative process from 2012 to 2015<sup>2</sup> which yielded two important results: 1) SFPs improved the quality and availability of items for their own district as well as more broadly; and 2) SFPs built a community of practice that provides learning opportunities, ideas to improve meal programs, and a safe space to share challenges. In Focus Midwest, SFPs representing seven large<sup>3</sup> districts in Illinois, Iowa, Michigan, Minnesota, Nebraska, and Ohio agreed on types of products to pursue and developed a joint understanding of desirable food attributes. The SFPs subsequently worked together to access these products by sharing information and specifications, partnering with USDA Foods, and collaborating with manufacturers.

Instead of accepting what was currently for sale in the school food market, Focus Midwest encouraged SFPs to leverage their common interests and purchasing power to engage directly with manufacturers. Manufacturers responded to the potential market the group represented – over \$170 million in combined food spending per year<sup>4</sup> – and the chance to work with a group of districts eager to provide feedback on product development. By working as a group, the SFPs shared the burden of conceiving and evaluating new products. Ultimately, they successfully brought several new products into their own districts as well as the larger school food marketplace.

Through these activities, the SFPs together forged a community of practice<sup>5</sup> in which individuals developed both professionally and personally, establishing strong intra-group relationships. They listened to others' successes and challenges, learning about best practices for purchasing and serving high-quality foods, as well as other aspects of meal program operations. By working

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<sup>1</sup> Originally called the Upper Midwest Regional Learning Lab

<sup>2</sup> The Focus Midwest project remains active as of summer 2017; however, this article covers the project from initiation through 2015.

<sup>3</sup> Enrolled students in school year 2012-13 ranged from 34,092 to 395,948 students.

<sup>4</sup> Based on procurement data collected by School Food Focus

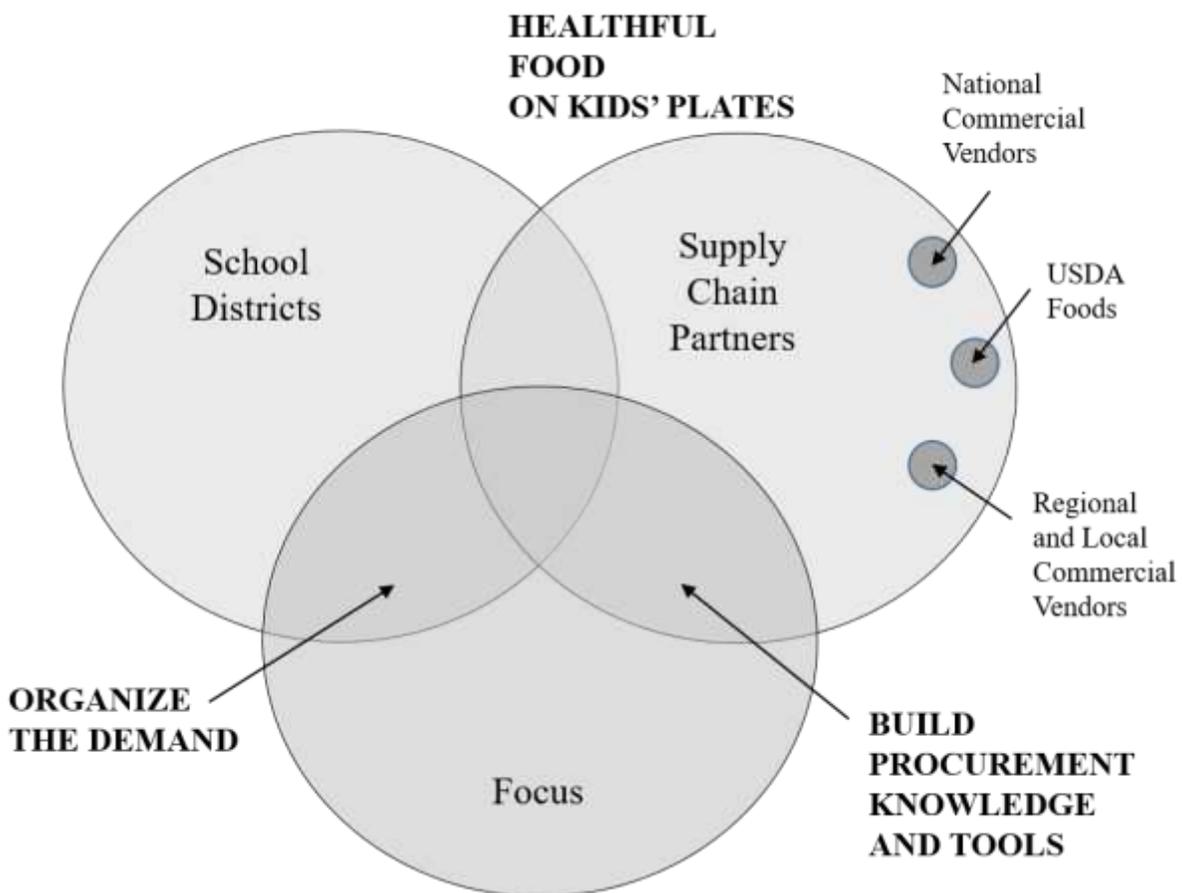
<sup>5</sup> A community of practice is a group of people who come together and build strong relationships because they share a similar profession or area of work, and by sharing ideas and practices they increase personal and professional knowledge and skills.

together, the SFPs developed skills, understanding, and relationships that continue to support them in accessing and serving new foods, both as a group and individually.

The collaborative nature of the project was crucial to its success in both changing the market and developing a community of practice (Mavrolas & Rusmore, 2016). Below, we describe the details of the project and the ensuing results of the collaboration.

## METHODS

Launched in 2012, Focus Midwest initially involved seven school districts (1,182 public schools) with a combined enrollment of 643,912 students (PK-12). Participants are districts' school food directors, chefs, and nutrition and procurement staff. In addition, the districts selected community partners, primarily nonprofits, to provide support. The activities of Focus Midwest were initially fully coordinated by and funded through Focus.



**Figure 1. Focus Midwest Collaborative Approach**

At the outset of the project, Focus Midwest developed outcome goals, which clearly state the primacy of collaboration as a strategy: “A collaborative community of practice is formed with seven school districts and their partners and develops useful models, practices, tools and knowledge about school food procurement change.” The second goal reflects the focus on procurement change: “[Focus Midwest] strategically selects and procures a significant and measureable increase of more healthful, regionally and sustainably (HRS) produced food items.”

To achieve these goals, the Midwest SFPs chose to work on four food categories: chicken, turkey, legumes, and produce. They agreed on items from these categories to prioritize and developed guidelines for more healthful, regionally sourced and/or sustainably produced versions of these foods. Together they developed and approved specifications for each of the food items sought, detailing what they wanted and what they did not want, such as particular ingredients and production practices.<sup>6</sup> Then the SFPs worked to find the desired items and establish the supply chain to deliver them.<sup>7</sup>

With Focus' organizational support, the SFPs employed a variety of strategies to access the desired products based on sharing information, communicating with one another, researching availability and cost of products, and honest discussion about what would work or not in their individual districts. In some cases, districts discovered that an item another district was purchasing would work well for them. Other items did not yet exist, so through multiple rounds of testing, feedback and negotiation with manufacturers, the group helped to develop new products.

Districts worked together mainly at twice-yearly, multi-day, in-person meetings facilitated by Focus staff. Over time, SFPs built trust in one another as they discussed their procurement goals as well as shared improvements they had made in their programs and challenges they faced. Between meetings, Focus supported their efforts with additional research and hosted approximately monthly calls. SFPs also met informally at other regional and national school food events.

## RESULTS

The collaborative strategy pursued by the SFPs of Focus Midwest was effective in two major ways: 1) influencing what items were available to their own district and on the school food market broadly; and 2) creating a community that provided support to the SFPs as they served new foods and pursued other improvements to their meal programs. The results detailed below were documented in the Focus Midwest Summative Evaluation Report (Mavrolas & Rusmore, 2016). Evaluators were engaged observers at all in-person meetings and most conference calls. They interviewed SFPs, community partners, Focus staff, and key allies. Participants also responded to four post-meeting surveys, providing data for longitudinal analysis. In addition, the evaluators included data from interviews with vendors who worked with Focus Midwest as well as annual procurement data tracked by Focus for all the districts from SY 2011-12 through SY 2015-16.

### Procurement

As they identified target food categories and products, the SFPs shared knowledge about specifications and particular items. Sometimes districts alerted their colleagues to an already available product, which sometimes led to purchase or became the basis for further engagement with the manufacturer for development of similar items. Vendors involved with Focus Midwest deemed this process worthwhile because they were able to glean real time feedback on new products and their likelihood of success.

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<sup>6</sup> See, for example, the Focus Ingredient Guide, based on input from the Midwest SFPs: <http://www.schoolfoodfocus.org/ingredientwatch/>

<sup>7</sup> In formulating these goals the SFPs considered implementation of the nutrition regulations laid out in the 2010 Healthy, Hunger-Free Kids Act as a baseline. Their desired characteristics represented their intention to go beyond these guidelines.

One district was purchasing raw drumsticks from chickens raised without antibiotics<sup>8</sup> from a Nebraska-based regional producer. Through this connection, other districts began negotiating with the same company. However, because several of the districts do not handle raw chicken, they had to find a regional processor to cook and distribute the product. One SFP spearheaded negotiations with a company who willingly invested over one year and 200 hours of staff time to develop the cooked product to the Midwest districts' specifications.

Similarly, as Focus Midwest started one district had already begun negotiations with a national supplier to develop a burrito made with recognizable beans, a whole-wheat tortilla, and natural flavors and ingredients. Because the Midwest SFPs wanted a legume product, and none were regionally available, they voted to join in these negotiations. The manufacturer agreed, and worked with the districts for experimentation and development. The company now sells three burritos reformulated to meet the districts' requests. Three of the Midwest districts purchased one or more of these, which increased their overall use of legumes significantly, and one Midwest district used the specifications to reformulate and purchase a similar burrito from a regional manufacturer. These products are now also available to many other districts through national distribution.

The SFPs also prioritized turkey products and quickly realized that they all purchased the bulk of their products from the same Midwest-based poultry company. Focus Midwest connected with the company to request all-natural, low-sodium, nitrate-free deli meats. Focus Midwest criteria guided the development process, and the SFPs participated in several rounds of product tasting, testing, and feedback. Ultimately, the turkey company added five new items, including two new deli meats, to its offerings for schools and has since expanded this all-natural, low-sodium line of products. Five of the seven Midwest districts purchased one of the deli meat items for SY 14-15, and three purchased one for SY 15-16, along with additional new clean-label products. Anecdotal evidence indicates that districts smoothly integrated these items into their meal service operations and that students generally did not notice the change or gave positive feedback.

### Community of Practice

In addition to facilitating access to new products, the collaborative nature of Focus Midwest also supported the SFPs in less tangible ways. Through their work, they developed a community of practice that supported them individually as they began to menu these items and grappled with other issues typical to school meal programs.

**Table 1. SFP Ratings of Personal Benefits of Focus Midwest Participation<sup>a</sup>**

<b>Practices</b>	<b>June 2013</b>	<b>Dec 2013</b>	<b>July 2014</b>	<b>April 2015</b>	<b>Average</b>
Sharing problems and finding solutions	4.7	4.0	4.3	3.2	4.1
Learning new information	4.6	4.1	4.4	4.2	4.3
Building new relationships	4.8	4.5	4.6	3.8	4.4
Gaining new skills and tools	4.5	3.9	4.6	3.8	4.2

<sup>a</sup> Respondents rated their agreement from 1 (Strongly Disagree) to 5 (Strongly Agree) with the statement "I benefit from my participation in [Focus South] by:"

<sup>8</sup> This producer's production practices are verified under the US Department of Agriculture "No Antibiotics Ever" Process Verified Program.

In surveys administered over two years, SFPs communicated the value of participation beyond concrete procurement changes. With the group, SFPs were able to share their own problems; brainstorm solutions; learn from Focus and one another; build new relationships; and gain new skills and tools. On a scale from one to five, with five being the highest, participants on average rated these professional benefits to their participation at 4.1 or higher. See Table 1.

When asked about these benefits in more detail, SFPs' responses included: "Collaboration with districts I have not known before"; "Specific ideas to implement"; "Learning about antibiotic use in poultry"; "Deeper knowledge of the procurement process and how school food can truly drive the market"; and "Building relationships that result in teamwork that can make positive change for all schools, big and small."

Participants also recognized that their participation encouraged their individual growth, particularly in terms of procurement. At the Focus Midwest October 2015 meeting participants completed a short post-/pre-assessment to determine how each individual saw his or her knowledge, skills, beliefs and confidence change over time. When asked, "To what extent did your participation in [Focus Midwest] support or nurture these changes?" SFPs averaged a response of 4.6 (with 5 as the highest) and rated new knowledge about unwanted ingredients and developing specific product specifications as their most significant area of learning and growth.

Particularly when the group experienced challenges, these personal and professional benefits often provided the glue to keep working together. Ultimately, by sharing common values, problems, and goals, and gaining new knowledge together, participants built confidence and trust and found their united voice for collective action. The personal relationships and community ultimately reinforced their ability to achieve their procurement goals.

### **APPLICATION TO CHILD NUTRITION PROFESSIONALS**

Collaboration between school food professionals has the potential to both achieve practical procurement outcomes as well as encourage individual personal and professional development. The Focus Midwest collaborative process, anchored in SFPs sharing knowledge and experiences about procurement or other issues, built relationships that continue to facilitate their joint and individual work. By working together on procurement, SFPs shared some of the burden involved in finding new products and engaged companies in ways they might not be able to alone. Involving several districts brought more weight to their voices than a single district might possess. When the group achieved success, information about new items spread quickly to like-minded colleagues. Other Focus members began purchasing the same chicken products and burritos after learning of their success in the Midwest districts. Additionally, SFPs in Focus Midwest shared information with colleagues in their individual states, further expanding the potential for smaller districts to access desirable products.

Several challenges to collaborative efforts between school districts are highlighted by this project. Developing a community of practice is a resource- and time-intensive endeavor. Developing a common understanding on which products to procure, their characteristics, and how to go about getting them required much discussion. While collaboration may save districts time and effort in some elements of their procurement process, working with others can be time-consuming and may seem like an extra burden. Negotiating logistics to bring the group together was never simple. Building relationships and making decisions among individuals with varied personalities and from districts with different needs, priorities, and cultures was not a smooth

process. In addition, individuals often became frustrated by the slow timeline, dead ends, and back-and-forth with manufacturers. The evaluators found that Focus' role as the intermediary support organization was essential to success, providing skills, information, strategic analysis, resources, new connections and leadership (Mavrolas & Rusmore, 2016). The project initially required intensive work from several Focus staff, and, even as it reaches maturity and independence, still requires time and financial support from an outside partner, particularly to support coordination, calls, and meetings.

Other school food professionals can learn from the Focus Midwest experience. Even if resources for intensive collaboration are not available, SFPs can seek out relationships with like-minded colleagues from other districts to share successes and challenges and learn from one another. These relationships could include working together on procurement, such as jointly approaching a manufacturer or distributor about desired products. Bigger districts may be able to aid smaller districts to persuade a manufacturer to make a change to a product or a distributor to stock a particular item. Focus Midwest districts are currently exploring the possibility of using their size and purchasing power to work with nearby, smaller districts in these ways. School food service staff may not always feel powerful in the face of the marketplace and their daily constraints, but through collaboration, they can combine their experience, expertise, and purchasing power to implement improvements to their meal programs.

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### **BIOGRAPHY**

Rosenthal and Liquori are both associated with School Food Focus where Rosenthal is a Research Specialist and Liquori is Founder and Executive Director. Rosenthal is also a doctoral student at Rutgers University in New York. Mavrolas is Principal at Mavrolas & Associates in Helena, Montana, and Rusmore is Principal at Rusmore & Associates in Bozeman, Montana.