

CASE STUDY BOSTON, MA DECEMBER 2024

Boston's Good Food Purchasing Policy, Part 2:

Assessing the implementation of the city's values-based procurement requirement

In March 2019, the Boston City Council passed Boston Municipal Code §4-9, an ordinance "Requiring City Departments and Vendors to Adopt Good Food Purchasing Standards" (GFPS).¹ The ordinance requires city departments to use five value categories as defined by the Center for Good Food Purchasing as a framework to guide food procurement decisions: local and community-based economies, environmental sustainability, valued workforce, animal welfare, and community health and nutrition.² Boston's ordinance also encourages food procurement that ensures a fair price for farmers and invests in minority and disadvantaged communities.

The passage of the GFPS in Boston resulted from an initiative driven by a diverse coalition of stakeholders committed to values-based food procurement.³ Now Mayor, then Councilor-at-Large, Michelle Wu introduced the ordinance.⁴ Supporters of Boston's GFPS initiative hoped to leverage city purchasing power to improve sustainability, fair working conditions, and local opportunity in the regional food system. At the time, Boston joined nine other cities that passed

The Healthy Food Policy
Project produced a case
study that followed the
policy development,
coalition building, and
passage of ordinance
\$4-9. This updated
case study highlights
Boston's progress toward
implementing the valuesbased procurement
required by the GFPS and
provides a few key lessons
learned.

laws or municipal ordinances based on templates provided by the Center for Good Food Purchasing. The Center for Good Food Purchasing continues to support Boston and Boston Public Schools (BPS) in the implementation of values-based procurement policies, which includes supporting Boston with action planning and program updates released in 2023.

To date, implementation of the GFPS has primarily focused on procurement at Boston Public Schools (BPS), the city's largest food purchaser. Since 2019, BPS has increased the number of values-aligned products it purchases by reaching out to suppliers, hiring a new director with Good Food Purchasing Program (GFPP) expertise, and changing bidding practices to incorporate GFPS values.

Food Procurement at Boston Public Schools

School food procurement requires balancing menu planning, facilities requirements, and applicable state and federal laws. For Boston Public Schools, the GFPS is an additional requirement that it must consider as it procures, prepares, and serves meals. BPS serves on average 45,000 meals per day at 125 sites across the city. For the 2023-2024 school year, there were three main types of food service infrastructure at BPS, referred to as A, B, and Satellite sites. Each type has different delivery and food service needs.

Food procured by BPS must first meet the requirements of state and federal law. The National School Lunch Program (NSLP) is a federal law that funds school districts to provide free and discounted lunches to students.⁶ BPS also participates in the Community Eligibility Provision of the NSLP, which allows all meals to be provided at no cost to all students.⁷ As a condition of receiving federal funds, schools must abide by NSLP nutrition and meal composition standards.⁸ BPS must ensure the meals it serves meet these requirements before evaluating purchases based on the GFPS. Consequently, compliance with those requirements is a threshold consideration.



The Center for Good Food
Purchasing released an updated
version of the Good Food Purchasing
Program framework, the Good
Food Purchasing Standards 3.0, in
August 2023. This comprehensive
update grounds the following values
within the principles of equity,
accountability, and transparency:

Local and Community-Based Economies

Environmental Sustainability

Valued Workforce

Animal Welfare

Community Health and Nutrition

Boston Public School Cafeteria Infrastructure 2023-2024 School Year

44

Cafeteria A schools

have full kitchen facilities and storage areas and are eligible for direct deliveries from suppliers. **59**

Cafeteria B schools

have limited storage facilities and need daily deliveries from suppliers or through internal BPS distribution. 20

Satellite sites

have food preparation facilities or service areas and require daily delivery of vended meals.

Bidding

When BPS purchases food products, it must also follow Massachusetts law governing public procurement. Under Massachusetts law, any large purchases made by local governments must be "bid" using a written proposal that invites responses from potential vendors. In most circumstances, the law requires acceptance of the lowest cost bid. The invitation for bid process does not allow the consideration of non-price factors in selecting vendors.

Local government entities, including schools, purchase goods and services primarily through formal bidding. Bidding generally refers to the process by which government entities create a written request for a product or service and then solicit vendors to submit quotes. ¹¹ In the context of food procurement, this generally includes documents that list price, quantity, quality, and delivery requirements. As required by the City of Boston's procurement system, bidding with BPS also requires vendors to complete background checks, safety certifications, fair wage declarations, and truck safety guidelines. BPS issues multiple separate bids for different food products, such as fresh produce, pizza, beef products, or seafood.

For a school system as large as BPS, the volume and delivery requirements make fulfilling each bid complex. The winning bidder for the fresh produce bid in 2023 was FreshPoint, a division of Sysco. FreshPoint's winning bid contained price and quantity quotes for 96 separate products totaling over three million dollars.¹²

Yearly BPS Procurement Timeline

December - January

BPS Food and Nutrition Service Director and team draft menu plan for upcoming school year.

March

The bid is issued and published in the city record. Responses are due in no more than 90 days.

June

The winning vendor is notified, and the contract is signed.

February

The BPS procurement department drafts bids to source products that meet the menu plan.

April-May

Vendors respond to bids and the procurement department selects the lowest cost responsive bid.

The Baseline Assessment for Boston Public Schools

In March 2023, Boston Public Schools released its GFPS <u>Baseline Assessment</u> for the 2019-2020 school year.¹³ The assessment, provided by the Center for Good Food Purchasing, is required under section <u>4-9.2(1)</u> of the GFPS. The baseline assessment scores food purchases against specific criteria that define what "good food" is at that point in time. The baseline represents the first use of a scorecard to measure purchases made by BPS against GFPS criteria. The assessment is designed primarily as a starting point for comprehensive planning for improved procurement. Data collection for this assessment involved soliciting sourcing and other supporting information from suppliers and vendors. The accuracy of the data was limited by the Covid-19 pandemic and several suppliers going out of business or no longer working with the city.¹⁴ Roughly 30% of products sourced by BPS and its vendors for the 2019-2020 school year contained complete sourcing information.¹⁵

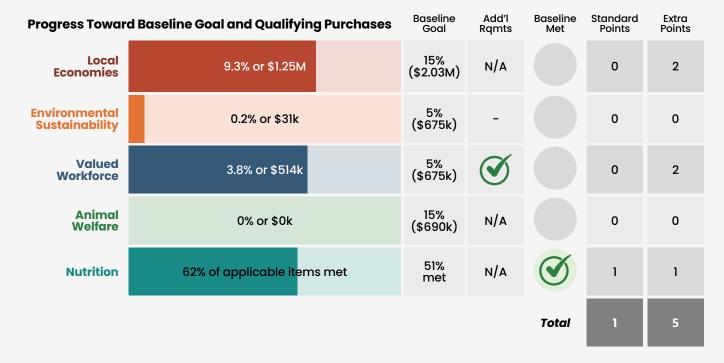
Boston Public Schools

Baseline Assessment School Year 2019 - 2020

\$13,491,484 in Total Food Spend Enrolled since 2021 8,087,760 meals served Scratch-cook, Heat and Serve, Speed scratch, Microwave, Cold meals

lout of 5Baseline Standards Met





GFPP scores products based on five qualifying criteria that range from level 1 to level 3. The criteria consist primarily of geographic information or third-party production certifications. The chart above from the BPS Baseline Assessment shows each value category with the corresponding initial goal and BPS score displayed as a percentage of overall spending. Due to limited data and other pandemic related factors, BPS could only demonstrate qualifying purchases sufficient to reach its initial goal in the nutrition category. A companion document, released with the assessment, details the qualifying criteria for each category.

In the case of the local economies category, the criteria define qualifying products as those grown or processed in the six states of New England. Unlike other local definitions, the GFPS does not include a mileage radius for local products but rather is focused on purchasing from New England as reflective of a regional food system. This difference from the GFPP Standards in other regions was decided by a local committee of food system advocates that sought to ensure that GFPP supported existing local and regional efforts, such as New England Feeding New England. The size of the source farm is also considered, as products are rated from level 1 (very large farms) to level 3 (medium) by farm revenue. During the 2019-2020 school year, 9.3% of products sourced by BPS satisfied these qualifying criteria because they were sourced from New England. Local economies qualifying products included bakery items from Calise & Sons Bakery in Lincoln, Rhode Island, and seed butter from 88 Acres in Canton, Massachusetts. Both companies were qualified as very large companies and scored at level 1.

Local Economies Baseline Requirement

An institution purchases at least 15% (by total dollar value) of product that meets the Local Economies standards or 5% of product that meets the Level 3 Local Economies standard.

Qualifying Criteria

Distance of source farm from institution

· Within New England

Size of source farm (based on revenue)

- Level 1 (Very Large)
- · Level 2 (Large)
- Level 3 (Medium)

Farm ownership

 Family farm or cooperatively owned

Extra Points

- 1%+ of food is purchased from small scale and family/cooperatively owned farms
- 5%+ of food is grown/raised AND processed in the same county
- 1%+ of food is purchased directly from farmerowned businesses
- 1%+ of food is purchased from Socially Disadvantaged Farmers/Ranchers
- Institution purchases from certified small-scale operations outside New England
- Institution invests in value-chain innovation among its suppliers
- Institution promotes employment or business opportunities for low-income entrepreneurs of color or disadvantaged communities

The other criteria consist of third-party certifications of production practices that are commonly found on consumer products. In the environmental sustainability category, for example, Level 1 qualifying criteria include certifications such as Sustainably Grown Certified,²⁰ while level 3 can be met by sourcing USDA Organic products. BPS demonstrated fewer qualifying purchases in this category than in local economies. The baseline assessment showed \$31,000 of spending in this category (0.2% of total food spend), of which USDA Organic 88 Acres products accounted for 65%.

Environmental Sustainability Baseline Requirement

This baseline requirement can be achieved through one of two options:

- Purchasing 15% of products that are third-party certified sustainable at any Level or 5% of product at Level 3
- 2. Reducing carbon and water footprint of animal product purchases by 4% from the first year of participation AND auditing food waste to implement food waste reduction strategies

Level 1 CERTIFIED FUNDANCE RAISED & LEO LEVEL 2 Protected Harvest Certified Sustainable CERTIFIED FOR THE PROTECTION OF THE PROTECTION

Extra Points

- Institution participates in "Meatless Mondays" campaign or equivalent meatless day program
- 100% of disposable flatware, dishes, cups, napkins and other service items are compostable
- No bottled water is sold or served; plain or filtered tap water in reusable jugs, bottles or dispensers is available

Additional Baseline Requirements

- No seafood listed as "Avoid" in Monterey Bay Aquarium Seafood Watch Guide
- At least 25% of animal products are produced without the routine use of antibiotics

Source: Boston Public Schools, Companion Document to Baseline Assessment



Good Food Purchasing Standards Policy Implementation

Boston Public Schools has undertaken multiple initiatives to increase the amount of GFPS qualifying purchases made in 2023. Notable initiatives include increased leadership expertise, changes to bidding procedure, outreach to potential values-aligned vendors, and community outreach. Implementation of the GFPS has focused on BPS primarily because it purchases substantially more food than any other city department.

The lag in implementation from passage of the ordinance in 2019 is due to the nature of the ordinance as well as the complex nature of institution food procurement. Implementation was substantially impacted by the Covid-19 pandemic, which dramatically changed the food procurement landscape and BPS's priorities. In addition, some food contracts span multiple years, which makes the process of shifting procurement slower than for those with annual bidding.



Photo courtesy of Boston Public Schools

GFPS implementation also coincides with substantial investment in cafeteria infrastructure to improve fresh food options. Over the last five years, BPS has renovated or improved nearly all cafeterias across the city. As of 2023, 119 of 125 schools now have the facilities to cook food on site, compared to approximately 40 schools in 2018.²¹ This improved food service capacity has created more opportunities for product procurement that meets GFPS goals, rather than relying on premade heat and serve lunches.²²

New Food Service Leadership

In spring 2023, Boston Public Schools hired Anneliese Tanner as the new Food and Nutrition Service (FNS) director. Tanner came to BPS with experience leading implementation of Good Food Purchasing Standards at the Austin Independent School District. As director of BPS FNS, she leads the team that creates the menu each school year, including a head chef, an operations and logistics lead, and group of consultants. The menu is the starting point for determining what products, and in what quantity, BPS will need to purchase. Tanner noted that Boston was well positioned to reach its GFPS goals: "Boston is in such a good position, and that's why I'm here. They've done a great job putting kitchens in so many sites so quickly. The possibilities are exciting."

Tanner also hopes to bring some lessons learned from implementing the GFPP in Austin. In Austin, she worked collaboratively with farmers and producers to increase the number of values-aligned products available. She also hopes that as more city departments begin implementing the GFPS, a friendly level of competition will spur citywide adoption of values-aligned purchasing.

2. Bidding Changes

The changes BPS made to bids, including adding criteria that specified New England grown produce and using line-item bidding, produced positive outcomes. Although Massachusetts law requires lowest cost bidding, BPS demonstrated that it could use existing bidding rules to source values-aligned products. These changes added over \$425,000 in New England grown produce compared to bids issued in 2022. This represents a 66% increase in the dollar value of products qualifying in the local economies value category.

Boston Public Schools achieved this increase in two ways. First, BPS added criteria to its fresh produce bidding, which requested a specific quantity of New England grown produce in 2023.²³ This language change resulted in an increase of over \$350,000 of locally grown produce available to BPS compared to 2022 when they requested produce without indicating a geographic preference. The existing produce vendor, FreshPoint, was able to meet these geographic criteria.

Second, Boston Public Schools issued a standalone New England grown frozen produce bid in 2023 that included the option for vendors to bid on individual products, or lineitems.²⁴ In prior years, BPS sought its entire requirement of frozen vegetables from one vendor. The 2023 frozen produce bid instead treated each product as an individual bid open to different vendors. This change in the bidding procedure allowed <u>Harvesting Good</u>, a public benefit corporation started by the Good Shepherd Food Bank in Maine, to win the bid for frozen broccoli. Harvesting Good is a vendor whose mission is "to improve access to nutritious food for all consumers and strengthen regional food systems by creating a mid-scale food processing venture," which specifically aligns with GPFS values.25 Currently, Harvesting Good focuses only on processing and freezing locally grown broccoli for wholesale. The change to line-item bidding allowed them to win the bid for broccoli, without having to source the other requested products. Harvesting Good supplied over 34,000 pounds of frozen broccoli to be served in BPS cafeterias for the 2023-2024 school year.26



Photo courtesy of Boston Public Schools

3. Vendor Outreach

Vendor collaboration is a critical tool to achieve Boston's goals of increased values-based purchases from regional food producers and BIPOC-owned food businesses. BPS has coordinated its outreach with several partners in city government including the Office of Supplier Diversity and the Office of Food Justice.

BPS has already made important progress collaborating with suppliers to improve procurement and record keeping. Section 4-9.2(1) of the GFPS requires city departments to notify vendors about the GFPS values and require they provide sourcing data for scoring.²⁷ First, BPS successfully included GFPS values language in its Invitations for Bid which requires vendors to provide sourcing information.²⁸ Invitations for Bid now contain language requiring the vendor "to share data that will help FNS complete an assessment of food procurement practices that will help us better understand the extent to which the food we are purchasing aligns with GFPP's values…"²⁹ Information requested includes sourcing information as well as detailed information on pack sizes, quantity, and item weights.

Nancy Fisher, a consultant working with Boston Public Schools on GFPP implementation, noted that vendors have embraced these measures showing little resistance to increased record keeping. BPS has been successful at encouraging vendors with similar values to participate in bidding. Harvesting Good, for example, was approached by BPS consultants about bidding opportunities. They would not have been aware of the opportunity with BPS absent this outreach. Nancy Fisher also hosted a gathering of farmers and food vendors to discuss how to improve collaboration and streamline the procurement process with the goal of increasing the number of vendors who participate in bidding.³⁰

The Office of Food Justice plans to focus on helping small and BIPOC-owned vendors to better understand how to successfully bid on contracts with BPS and other city agencies. This includes working with other city and state offices to break down the procurement processes and forms required, as well as supporting small and BIPOC-owned food businesses to become aware of and part of the city's Certified Business Directory. Finally, the Office of Supplier Diversity has created new levers to support Minority and Women Owned Enterprises (MWBE) vendors to win contracts, like the City's new Inclusive Quote Contract law, which raises the threshold requiring written quotes to \$250,000 for MWBE vendors.



Improved Collaboration and Stakeholder Engagement

Cross city implementation of the GFPP is integral to the overall success of the program. As §4-9.2 of the ordinance directs all city departments to use the GPFS as "a framework for guiding values driven purchasing," the Office of Food Justice (OFJ) will work to support other city departments with large scale food contracts to align procurement with values-based food purchasing standards.

In addition, OFJ has been working with the Mayor's Office, the Boston Good Food Purchasing Coalition, and youth engagement partners to identify meaningful opportunities for food system advocates and community members (such as students or families participating in BPS school meals) to form a Community Advisory Council as required by §4-9.4. OFJ is conducting ongoing research to develop this Advisory Council to increase transparency and involve community members in procurement decisions, while providing meaningful opportunities for input. However, the number of steps and tight timelines in the procurement process, as well as state ethics laws regarding public meetings, make developing compensated advisory bodies in the Commonwealth of Massachusetts complex. OFJ is working to ensure that transparency in procurement processes is a cornerstone of the ordinance's implementation.

Finally, the City of Boston does not have jurisdiction over many of the large public food purchasers located within the city, such as airports, convention centers, hospitals, and jails. OFJ is working with the Green Ribbon Commission Climate Justice Network to bring these institutions and other large food purchasers within the City of Boston together to develop shared values-based purchasing efforts beginning in 2024. Aliza Wasserman, Director of the Office of Food Justice since 2022, hopes that by supporting large public and private agencies to work together, the city will strengthen values-based supply chains for Boston throughout the Northeast, through strategies like developing unified metrics, understanding market development needs, and sharing best practices for vendor outreach.



Next Steps and Future Planning

After laying the groundwork for GFPS implementation in 2023, Anneliese Tanner and her office have already started planning for the future of the food service at BPS. Tanner has multiple priorities that balance GFPS scoring with other food service needs. In her view, the focus is on values, rather than ensuring each product is scored with the GFPS. She was unable to participate in the 2023 round of procurement and was excited about the increases in GFPS purchasing possible during her first full procurement cycle for the 2023-2024 school year. Tanner also highlights that GFPS values align well with her broader food service goals, such as increasing culturally appropriate meal options, scratch cooking, and implementing kitchen best practices.³¹

Centralized scratch cooking is a key goal Anneliese
Tanner hopes BPS can achieve in the near term. Although
BPS has made great strides in improving cafeteria
infrastructure, having a centralized processing facility
could allow them to use more GFPS aligned products. In
her view, scratch cooking is a key component to overall
food service improvement: "Scratch cooking is the vision
with all production in-house that focuses on values-based

BPS Food Service Goals

- Central scratch cooking
- Upgrade all cafeterias
- Improve kitchen staff capacity and instituting best practices
- · Improve student input
- Incorporate food education
- Daily self-serve salad bars at all sites

procurement as well as cultural flavors." Currently, BPS purchases many foods in a processed or semi-processed form, such as peeled and diced winter squash or apple wedges.³² Both of these products are available locally but rarely found in their processed form. Building internal processing capacity is critical to future GFPS improvements where local processing capacity is limited.

The BPS Food and Nutrition Service also hopes to improve outreach to new vendors and encourage increased participation. Even prior to the GFPS, BPS rarely received more than two bids for its larger procurement requests. Tanner indicated that the procurement team hosted technical assistance events for vendors beginning in 2023 to explain the bidding process and help them understand paperwork requirements. The documentation required can present a hurdle for smaller companies with less experience with formal bidding. Providing technical support could increase the number of suppliers who respond to BPS food bids. Technical assistance could also help meet the equity value contained within Boston's version of the GFPS.³³ Finally, reducing administrative burdens in bidding could help increase the participation of disadvantaged and minority communities.

"Scratch cooking is the vision with all production in-house that focuses on values-based procurement as well as cultural flavors."

- Annaliese Tanner, Food and Nutrition Service Director, Boston Public Schools

Challenges to GFPS Values-Based Procurement

The National School Lunch Program's Reimbursement Rate

The reimbursement rate per meal provided by the National School Lunch Program limits the ability of BPS to spend more on values-aligned products. GFPS products must be price competitive with their conventional counterparts to meet budgetary requirements in most circumstances.

Lowest Cost Bidding

Massachusetts Ch. 30B requires the lowest cost bidding procedures for most food purchased by BPS. In most circumstances, BPS cannot select a vendor that supplies GFPS aligned products over a lower priced competitor. Allowing GFPS values to be considered in bid awards can be done by writing bids that request values-aligned products specifically.

Burdensome Scoring Certifications

Scoring for the GFPS relies primarily on third-party certifications. These certifications can be expensive or burdensome to vendors, and many do not certify their products. Harvesting Good does not have production certifications to demonstrate its use of sustainable farming practices. The certification requirements in the GFPS can fail to credit BPS with sourcing values-aligned products.

Equity and Access for Smaller Vendors

Many vendors not currently working with the city note that the process for submitting a bid is labor-intensive, complex, and confusing. Bid responses require substantial paperwork and bids are often due in as little as thirty days. The limited support provided to new vendors privileges larger, established food service companies.

Limited Number of Suppliers

In many cases, BPS has a limited choice of vendors due to transportation and storage needs for its large number of schools. Prior to the GFPS, the complexity of selling to BPS sometimes limited the number of companies responding to a single vendor. Adding additional requirements such as the GFPS could further limit the number of vendors who respond to bids by adding additional requirements.

Lessons Learned

Implementing values-aligned procurement standards requires a multifaceted approach, a thorough understanding of local and regional conditions, and leadership commitment. A key finding of this case study is that implementation requires proactive outreach and willingness to change procurement practices. As noted by Matt Chin, President of Harvesting Good, school purchasing power can be insufficient to create the supply of more values-aligned products. As an important customer, BPS's demand will be a critical input in the determination of Harvesting Good's next product. Institutions seeking to use values-based procurement should consider a partnership approach with vendors that prioritizes outreach and collaboration.

For this case study, we spoke with school food procurement professionals who shared the following suggestions:

1. Ensure leadership and financial commitment.

Organizational commitment, both personal and financial, is essential to prioritizing values over traditional procurement practices. Leadership commitment to GFPS goals is a decisive factor in program success. Financial commitment is also needed to improve cafeteria facilities and fund additional staff work on GFPS implementation.

2. Collaborate with existing suppliers.

The most cost-effective way to improve qualifying purchases is to work with existing vendors. Boston Public Schools' experience shows that many vendors are willing to source different products or are actively interested in the GFPS. Existing vendors may also act as distribution networks for smaller producers.

3. Be creative with bids.

Bid drafting plays an important role in which vendors can respond and fill orders. The first step to purchasing more values-aligned products is drafting bids that ask for those products. Changing to line-item bidding or adding values-based preferences can help make bids accessible to smaller companies or vendors.

4. Plan for future improvement.

Changing procurement practices takes time and having a multi-year plan gives structure and benchmarks to the process. Other cities considering the GFPP should anticipate an implementation process that takes multiple years.

5. Seek out expertise.

Consultants who understand the regional food supply chain provide important expertise that can help procurement staff implement GFPS more quickly. Outreach to vendors conducted by BPS consultants was an important factor in finding vendors that shared GFPS values.

Trends to Watch in Local Food Procurement

Since 2019 when Boston passed its own version of the GFPP, the landscape of values-based institutional procurement has changed. Updates in the program made by the Center for Good Food Purchasing and changes to USDA rules (discussed below) have the potential to reduce barriers to purchasing values-aligned products.

First, the Center for Good Food Purchasing released an updated version of the Good Food Purchasing Program framework, the Good Food Purchasing Standards 3.0 in August 2023. The comprehensive update centers the five food system values around the principals of equity, accountability, and transparency. The updated program also gives credit to schools that make improvements to their internal processes and makes it easier to receive credit for purchasing local food. According to the Center for Good Food Purchasing, all institutions participating in GFPP will receive future assessments under this rubric, complemented by an action plan co-developed with institutional leaders to advance their Good Food Purchasing progress across each value category.

Second, effective July 1, 2024, USDA now allows schools participating in the NSLP to request "locally grown, raised or caught" produce or minimally processed food in procurement requests.³⁴ Prior to this rule change, locality was only allowed as a scoring criterion, not a bid requirement. School procurement departments are also given the freedom to define local for their area.³⁵ Previously to this rule change, only regional preferences were allowed, as used by Boston Public Schools in its bidding request.³⁶ Boston could, following this rule change, issue bids requesting only Massachusetts grown produce if desired. This change will likely have a greater impact in large states or areas that do not already draw on regional food systems.

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