

Farm to School*

Equipment and Infrastructure Grant

Program Guidelines

2023-2025

Dates

Publication Date: March 1, 2024

Application Due Date: April 10, 2024

Estimated Award Date: June 2024

**Farm to School includes the eligible entities under the Oregon Department of Education (ODE) Farm to Child Nutrition Program (CNP) in [ORS.336.431\(3\)\(a\)](http://ors.legislature.gov/ors3364313a) and tribal entities.*

TABLE OF CONTENTS

Introduction.....	1
Important Dates and Timeline.....	2
Eligibility.....	3
Funding.....	7
Funding Period.....	9
Program Priorities.....	9
Application Requirements and Procedures.....	10
Letter(s) of Intent to Buy.....	12
Application Checklist.....	13
Submission Details.....	13
Review Criteria and Process.....	16
Policies and Requirements.....	17
Post Award Management and Requirements.....	18
Reporting Requirements.....	21
Definition of Terms.....	23



FAQs and Contact Information.....25

Appendices.....26

- Appendix A: Proposal Form (Sample).....26
- Appendix B: Work Plan (Sample).....32
- Appendix C: Budget Detail (Sample).....33
- Appendix D: Letter of Intent to Buy (Sample).....36
- Appendix E: Scoresheet (Sample).....37

INTRODUCTION

The Oregon Department of Agriculture (ODA) is pleased to announce a competitive solicitation to award funds under the Oregon Farm to School Producer Equipment and Infrastructure Grant Program to Oregon producers, ranchers, seafood harvesters, fishermen, and processors who intend to sell food produced or processed (this includes food grown, harvested, gathered, raised, caught, or processed) in Oregon to any of the following food sponsors identified in [ORS.336.431\(3\)\(a\)](#) and Tribal entities:

- A school district participating in the National School Lunch Program (NSLP);
- A provider of center-based programs for children in the Child and Adult Care Food Program (CACFP);
- An entity that provides meals through the Summer Food Service Program (SFSP); and
- Tribal schools, Tribal Early Learning/Childhood Education sites, and other Tribal youth meal programs.

The Oregon Department of Agriculture recognizes the following core elements of the Farm to School Program: 1) education, 2) procurement and 3) school gardens. Farm to School programs serve locally grown, raised, harvested or processed foods in school cafeterias, improve student nutrition; provide agriculture, health, and nutrition education opportunities; and support local and regional farmers. Over the past several years, Oregon's Farm to School Program has grown to reach more than 500 producers and processors that have sold an annual average of \$25 million of Oregon products to schools. Despite this success, many producers and processors face obstacles to enter the school marketplace and scale their businesses to meet school service demand. For more information about the school marketplace please visit <https://oda.direct/f2s> and review the materials in the Farm to School Producer and Processors Toolbox.



IMPORTANT DATES AND TIMELINE

Event	Date
Request for Applications (RFA) Opens	March 1, 2024
Grant Information Training	<p>March 8, 2024 10:00 – 11:30</p> <p>Microsoft Teams meeting Join on your computer, mobile app or room device Click here to join the meeting Meeting ID: 296 420 646 936 Passcode: dDVZ3C Download Teams Join on the web Or call in (audio only) +1 503-446-4951,,279321961# United States, Portland Phone Conference ID: 279 321 961# Find a local number Reset PIN</p>
Grant Office Hours (virtual)	<p>March 22, 2024 10:00 – 11:30 April 5, 2024 10:00 – 11:30</p> <p>Microsoft Teams meeting Join on your computer, mobile app or room device Click here to join the meeting Meeting ID: 237 404 724 145 Passcode: MwFmes Download Teams Join on the web Or call in (audio only) +1 503-446-4951,,526073114# United States, Portland Phone Conference ID: 526 073 114# Find a local number Reset PIN</p>
RFA Closes	April 10, 2024 @ 5:00pm
Screen Applications for Qualifying Proposals	April 12, 2024
Proposals reviewed by Grant Evaluation Committee	Early May 2024
Recommended Proposals reviewed by Directors Office	Mid May 2024
Awards announced	June 2024

ELIGIBILITY

Eligible Applicants

Person(s) who intend to sell food produced or processed in the state of Oregon to any one or more of the following: i) school district participating in the National School Lunch Program (NSLP), ii) a provider of center-based programs for children in the Child and Adult Care Food Program (CACFP), or iii) an entity that provides meals through the Summer Food Service Program (SFSP), or iv) Tribal Schools, Tribal Early Childhood Education (ECE)/Head Start, and other tribal youth meal programs.

For simplicity, food sponsors identified in [ORS.336.431\(3\)\(a\)](#) and who operate Tribal meal programs will be referred to as “schools” in these grant guidelines.

For the purposes of this program, “intend” is defined as persons who i) have a history of selling food products to schools, ii) currently sell food products to schools, or iii) do not currently sell food products to schools, but plan to do so in the future.

To be eligible for grant funds under the program, an applicant must be a “producer.” A “producer” includes any of the following entities:

- a person who borrows, leases, rents, or owns Oregon land, whether the land is publicly-owned, privately-owned, or tribal land, on which crops are cultivated or gathered, and/or livestock is raised;
- an Oregon seafood harvester or fisherman;
- an Oregon for profit business, including Tribal Enterprises, agricultural cooperatives (such as physical food hubs), and non-profits that source not less than 51% Oregon produced product:
 - whose primary function involves production, processing, packaging or distribution of food service products or some combination thereof; and/or
 - produces, processes and sells Oregon agricultural products or services for the mutual benefit of members.

Additionally, to be eligible, an applicant must be registered to do business and in good standing with the Oregon Secretary of State and have an acceptable performance history in ODA grant programs (if applicable). All grant awards will be conditioned upon the applicant's execution of a grant agreement in form and substance acceptable to ODA in its sole discretion.

All applicants will be asked to meet a level of food safety consistent with their farm or business operations. Applicants will be expected to work with ODA to determine what food safety schemes are best suited for their farm or business. If you do not know what food safety requirements may be necessary for your proposed project, call ODA Food Safety at 503-986-4720 or visit [Find my Food Safety Inspector](#) to find a local food safety specialist in your community. Applicants identifying as tribal enterprises or tribal producers should consult with their respective Tribal regulatory authority on requirements to manufacture, distribute and sell food products on and off tribal lands.

Applications will not be evaluated based on current food safety practices or certifications and applicants may use funds for costs to meet necessary food safety requirements for proposed projects. This may include, but is not limited to, obtaining appropriate food safety certification, preparing on-farm food safety plans, participating in an on-farm readiness audit, attending a (Food Safety Modernization Act) FSMA class, and others as identified.

Funds are intended to support businesses that will:

- Start or expand processing and aggregating capacity to sell Oregon products to schools
- Increase the use and/or processing of Oregon agricultural products
- Purchase qualifying machinery or equipment or cover costs associated with infrastructure improvements to start, upgrade or modernize value-added businesses
- Grow, harvest, gather, raise, catch, or process food and products in Oregon

Eligible Projects

Projects must:

- Aim to increase sales of Oregon agricultural products by increasing production and/or processing capacity to meet school marketplace demand.
- Request funds greater than \$10,000 and less than \$75,000
- Not begin until an executed agreement is signed by all parties.
- Be completed by December 31, 2025. Awarded grants cannot be extended beyond this date.

Grant funds must be used solely for equipment and infrastructure projects that will increase the production and processing capacity of producers. Accordingly, all food products must be either produced in the State of Oregon; more than minimally processed in the State of Oregon; or both produced and processed in the State of Oregon. See [OAR 581-017-0430\(2\)](#). Moreover, acceptable food products do not include fluid milk sold or served in cartons or other containers 8 ounces in size or less, fluid milk sold in bladders or bags for use in self-service milk or beverage dispensers on the serving line, breads, buns, rolls, pan sprays, margarine, and mayonnaise and any other ineligible foods published by ODE on its website. See [OAR 581-017-0430\(4\)](#).

Equipment:

Qualifying machinery and equipment may be new or used capital asset(s) that depreciates in value over time (“Qualifying M&E”). Examples of Qualifying M&E include, but are not limited to, seeders, transplanters, cultivators, conveyors for moving and handling product, washing stations, sorting and sizing bins, product bins and totes, coolers and refrigeration units, grading and inspection equipment, tractor implements or attachments, compressors, blanchers, peelers, wrapping and packaging equipment, sanitation and food safety equipment such as water filtration systems and/or byproduct waste management and treatment systems.

Infrastructure:

Infrastructure includes, but is not limited to, food safety certification or licensure and physical systems necessary for an agricultural business such as, but not limited to, technology improvements, transportation, communication and electrical systems. Infrastructure expenses that may be eligible under this program include improvements to existing buildings or facilities, greenhouses, high tunnels, fees for food safety licensure, providing broadband or fiber-optic systems, and software systems.

Labor:

Labor associated with the installation of Qualifying M&E and construction of infrastructure will be an allowable expense under the project.

A list of potential eligible items is below. This is not an exhaustive list - other projects that align with the funding purpose will be considered.

Eligible items include, but are not limited to:

- Purchase and installation of equipment used in the production of value-added agricultural products
- Grading, packing, labeling, packaging, or sorting equipment for raw agricultural products
- Equipment that helps to maintain the identity and traceability of products
- Processing equipment or physical improvements for production and/or value-added processing facility to reduce food safety risks
- Cooler walls and refrigeration units
- Creamery or dairy product processing and packaging equipment
- Livestock care, feeding or slaughter equipment
- Seafood and fish harvesting equipment
- Contractor costs and materials for installation of approved equipment, including, for example, plumbing, drainage, venting, and electrical work

- Renewable energy production equipment
- Food safety certification and licensing fees
- Aquaponics or aquaculture equipment related to processing produce or fish
- Labor costs associated with project design/engineering
- Building retrofit or upgrade
- Physical systems necessary for business such as technology improvements, electrical and facility system improvements

Ineligible items:

- Biodigesters or biomass plant projects
- Consumables, ingredients and items that are not reusable
- Land and building purchases
- Refrigerated vehicles, fishing vessels, tractors
- Fines, penalties and other settlement expenses resulting from failure of applicant to comply with Federal, State, Local or Indian Tribal laws and regulations
- Indirect (overhead) costs
- Product research and development
- Advertising, public relations or marketing materials
- Bad debts, related collection costs and legal costs
- Lobbying and political activities
- Fundraising, including financial campaigns, solicitation gifts and bequests, and similar expenses incurred to raise capital or obtain contributions

FUNDING

There are \$500,000 available for the ODA F2S Equipment and Infrastructure Grant Program for the 2023-2025 biennium. Applicants may request no less than \$10,000 and no more than \$75,000 for proposed projects.

Matching Funds

Matching funds are required for this grant program. All applicants must provide documentation of secured match funds in the application and will be required to track matching funds towards the project if awarded. Detailed matching sources will be required as part of the contract agreement with ODA if awarded. Matching funds can be in the form of in-kind contributions such as labor associated with the design, installment or construction of the project or cash match.

Cash match is defined as real cash contributions towards the project.

Examples may include but are not limited to:

- Cash contributed by your organization (from loans, grants, or other sources)
- Items to be purchased by your organization for project activities (such as equipment or infrastructure)

In-kind match is defined as paid or given in goods, commodities, or services instead of money. Examples may include but are not limited to:

- Personnel time given to the project
- Use of existing equipment or facilities, or rental costs towards use
- Person on loan from another organization/business

Matching requirements are as follows:

- A minimum 20% matching requirement of requested funds for applicants that have sold to schools for more than 5 years.
- A minimum 15% matching requirement of requested funds for applicants that have sold to schools for 1-4 years.
- A minimum 10% matching requirement of requested funds for applicants that have no experience selling to schools.

FUNDING PERIOD

The anticipated start date for the ODA Farm to School Equipment and Infrastructure Grants is May 15, 2024. All activities proposed under this grant must be completed, and all expenses incurred under the grant must be expended by December 31, 2025.

Distribution of Funds

Successful applicants will receive 75% of requested funds upon execution of the grant agreement. Successful applicants may also be subject to documentation of information ODA deems necessary for award. The remaining balance of awarded funds will be distributed as follows:

- 25% of remaining awarded funds upon (i) submission of a progress report accompanied by bill of sale or purchasing orders and financial expenditure worksheet (template will be provided by ODA if project is awarded) of all proceeding funds and (ii) completion of one monitoring site visit by ODA staff.
- A final report will be required detailing the expenditures of the remaining 25% of funds.

PROGRAM PRIORITIES

Pursuant to Oregon Revised Statute (ORS) Chapter 200, the Agency encourages the small businesses certified by the Oregon Certification Office for Business Inclusion and Diversity (“COBID”) to apply ([ORS.200.055](#)).

This includes certified small businesses in the following categories: disadvantaged business enterprise, minority-owned business, woman-owned business, a business that a service-disabled veteran owns or an emerging small business. Agency also encourages joint ventures or subcontracting with certified small business enterprises.

For more information, visit:

<https://www.oregon.gov/biz/programs/COBID/Pages/default.aspx>

To help the Agency achieve diversity in the distribution of awards, ODA encourages applications from women and people of color – owned or operated farms and businesses. Additionally, ODA will provide preference to eligible applicants that identify as any of the following:

- Small to Medium-Sized Farmer, Rancher, or Seafood Harvester/Fisherman
- Beginning Farmer, Rancher or Seafood Harvester/Fisherman
- Service-disabled veteran

APPLICATION REQUIREMENTS AND PROCEDURES

Applicants may collaborate with others to prepare a proposal and may subcontract out for the delivery of services under the project. Applicant must specify in the application who will manage the project and who the point contact for the project will be. An applicant must specify how partner organizations will work with each other and who is responsible for which parts of the project. Applicants should consider preparing a Scope of Work (SOW) to ensure agreed upon deliverables and payments.

Public Records

Please note that, unless an exemption applies, all information and records submitted to ODA are subject to disclosure under the Public Records Law, [ORS 192.311 to 192.478](#).

APPLICATION INSTRUCTIONS

The Oregon Department of Agriculture Farm to School Equipment and Infrastructure Grant Program required application materials including templates for the Proposal Form and Letter of Intent to Buy are available at <https://oda.direct/F2S>. Please download these required documents to complete your full application.

You must completely answer all questions and prepare required materials in entirety within the word or page limits specified in the Application Checklist on page 15. In the Appendices you will find samples of: Proposal Form (Appendix A), Work Plan (Appendix

B), Budget Detail Sheet (Appendix C), Letter of Intent to Buy (Appendix D). The Scoresheet, including the criteria indicating how applications will be evaluated, is included in Appendix E. Answers that do not meet requirements will be invalid and the application will be rejected.

Proposal Form

Proposals must provide detailed information for the following areas of the project. The proposal form is provided in Appendix A for reference.

- Project Title
- Total Project Cost and Grant Request
- Expected Project Start and End Date
- Executive Summary
- Applicant Background
- Experience Selling to Schools
- Equipment and Infrastructure Needs
- Business Readiness and Financial Sustainability
- Impact on Oregon Agriculture and School Market Access
- Matching Funds
- Food Safety

Work Plan

A work plan is required for your proposed project. A sample of a completed work plan can be found in Appendix B. When completing your work plan include specific steps you will take to successfully complete your project. For example, you may include target dates for requesting quotes, installing and testing equipment, or your anticipated first date of sale to a school. You may add additional lines as necessary to the work plan template. The work plan must be no more than two pages. Work plans that exceed the two-page limit will be rejected.

Budget Detail

A budget detail for your proposed project is required. A sample budget is provided as a reference in Appendix C. When completing the budget detail sheet, provide an estimation to the best of your ability on project costs, (labor, equipment, etc.), item quantities and funds requested for your proposed project. Provide sources for estimated costs of equipment and infrastructure requests. As a reminder, indirect (overhead) costs, are not allowable under this grant. As a reminder, labor is an allowable cost including both personnel and contracted services. Matching funds are required for this grant (at minimum, 10%, 15% or 20% depending upon your experience selling to schools). Review the matching requirements on page 10 of this document. You may add additional lines or pages as necessary for the budget detail. The budget detail must be no more than five pages. Budgets that that exceed the page limit will be rejected.

LETTER(S) OF INTENT TO BUY

Letter(s) of Intent to Buy from schools and food sponsors identified in [ORS.336.431\(3\)\(a\)](#) or from Tribal schools are a **requirement** under this grant program. Letters of Intent are not scoreable; however, the Letter of Intent must be prepared by the food service sponsor or tribal entity partnering on your project. The letter must describe how this project will contribute to the sponsor's effort to source Oregon products and include specific information about the product they will purchase from the applicant. While it is not a requirement that a successful applicant sells to a school during the grant period, only applications that provide a timeline clearly defining when the anticipated first sale is intended to occur will be competitive. You may submit up to three letters from sponsors as part of your proposed project and each letter must be no more than one page. A sample of Letter of Intent is provided in Appendix D.



APPLICATION CHECKLIST

Material	File Names	Acceptable File Formats
Proposal Form	Include applicant name in the file: LastNameFirstName_Proposal2024	MS Word, PDF fillable form
Letter(s) of Intent to Buy	Include applicant name in the file: LastNameFirstName_LOI_NameofSponsor2024	MS Word, Google Document, PDF, submit up to 3 letters

SUBMISSION DETAILS

NOTE: Carefully read the ODA F2S Equipment and Infrastructure Grant Program Guidelines (this document) before completing the application materials found at <https://oda.direct/f2s>.

Applications must be received by ODA by 5:00pm on April 10, 2024 via the File Transfer Protocol. All mailed, faxed or applications that are dropped off, must be received by 5:00pm on April 10, 2024. ODA will not review or consider applications (or additions or revisions) received after the deadline.

File Transfer Protocol

ODA prefers that applicants upload application materials to the Agency's File Transfer Protocol. However, ODA will accept handwritten, mailed, or faxed applications.

Mail & Fax

Mailed applications must be received by 5pm on April 10, 2024. Please send mailed applications to:

Oregon Department of Agriculture
Farm to School Program
Attention: Amy Gilroy
635 Capitol Street NE
Salem, OR 97301

To fax your application, please include a cover sheet that includes the title "ODA Farm to School Producer Infrastructure Grant", attention to Amy Gilroy, and the total number of pages sent.

Fax number: 503-986-4737

Drop Off

You may drop off your application in person before the deadline of April 10, 2024 5:00pm. For Salem, you may drop off your application any day before the deadline by going to the main entrance at 635 Capitol Street NE Salem, OR 97301.

Appointment

You may also make arrangements to drop off your application by making an appointment. Please contact the general inbox: f2sgrant@oda.oregon.gov

FILE TRANSFER PROTOCOL INSTRUCTIONS

Make sure all documents are in the formats required in the Application Checklist table (page 15) before uploading to the ODA File Transfer Protocol.

Step 1: Enter <https://files.oda.state.or.us/?Login=macpa> in your browser window

Step 2: Complete the input form, providing full name, email address and phone number

This is the upload form for the MAC Program Area.
Please complete this form and submit your files.

Name:

Email Address:

Phone Number:

Step 3: Upload all appropriate documents by dragging documents into the upload box, or select the documents from a file on your computer

File Upload

Choose Files By Selecting

or

Drag files into this box for upload.

Step 4: Include in the comment box “Farm to School – Equipment and Infrastructure Grant Application” and list each uploaded file by name.

Step 5: Click on the “Begin Upload” button.

Step 6: “File has been successfully sent” message will appear on confirmation page after files are uploaded

REVIEW CRITERIA AND PROCESS

Review Criteria

ODA's intent is to use available funds to catalyze business development and profitability for Oregon producers and processors that intend to sell to schools, and to fund projects that produce the highest degree of measurable benefits in relation to each dollar spent.

Scoresheet

A scoresheet will be used to evaluate applications and determine the merit of projects. The scoresheet can be found in Appendix E. The Scoresheet will include criteria for the following:

- Business Mission and Financial Standing
- Project Purpose and Business Readiness
- Impact on Oregon Agriculture and School Market
- Budget and Matching Funds
- Diversity and Inclusion

Process

The first level of review is an administrative review to determine whether minimum proposal requirements are met and the application is complete. If applicable, an assessment of the applicant's past ODA grant performance will also be conducted. The second level is a technical review to evaluate the merits of the proposals.

An ODA Farm to School Grant Review Evaluation Committee along with the ODA Internal Review Team will perform the technical review. The committee is made up of growers, industry, public agencies and representatives from non-profits with technical interest and expertise in farm to school and agricultural systems. The committee will evaluate the applications against the scoring criteria.

The ODA has ultimate authority to decide which applications are approved and funded, and may consider other priorities when granting awards, such as, but not limited to, geographic diversity and a range of projects from rural and urban areas.

If funding is not sufficient to fund all applications that merit awards, ODA reserves the right to fund applications at lesser amounts than requested. ODA may choose to fund partial aspects of a project. The final selection process is completed by the ODA Director, after which grantees and award amounts will be announced.

POLICIES AND REQUIREMENTS

Unless an applicant receives an award notice, any contact from ODA does not constitute a notice of a grant award. Pre-award or pre-agreement costs incurred prior to the effective start date of the project or fully executed agreement are unallowable costs. Only the recognized ODA authorized signature on a grant agreement can bind the ODA to the expenditure of funds.

ODA reserves the right to:

- Reject any or all proposals received;
- Waive or modify minor irregularities in proposals received after prior notification and agreement of applicant;
- Provide partial funding for specific proposal components that may be less than the full amount requested in the grant application;

- Require a good faith effort from the grantee to work with ODA subsequent to project completion to develop reporting data or implement the project results, where applicable;
- Withhold any payments that do not meet grant conditions;
- Require return or refund of grant monies used for expenditures that are not allowed or unauthorized.

POST AWARD MANAGEMENT AND REQUIREMENTS

Grantees must:

- Attend a required training on School Market Orientation
- Comply with the grant criteria in the ODA Farm to Child Nutrition Program Equipment and Infrastructure Grant Guidelines;
- Make adequate progress toward achieving the grant project;
- Expend grant funds in a way that meets provisions of pertinent statutes, regulations, ODA administrative requirements, and relevant cost principles;
- Comply with records retention and access requirements (6 years retention of all records and documents pertaining to award post final check received on agreement); and
- Use State funds responsibly and spend the entire grant award during the biennium for which the grant was awarded

Grantees that are not making adequate progress towards the items above may be removed from the grant program and be required to return unspent funds and if unable to complete awarded projects must reimburse ODA for costs associated with equipment and infrastructure purchases, labor and contractual services, and any and all other expenditures made with the advancement of State funds.

Change of Key Personnel

When it is necessary to change the project contact for a period of more than three (3) months, grantee must submit a written request (email is acceptable) to ODA. Request should contain the new individual's name and contact information.

Change in Project Scope

When it is necessary to modify the scope of the project, grantee must submit a written justification for the change along with the revised scope of the award to ODA. ODA must review and approve any and all changes to a previously approved project. ODA reserves the right to deny changes based on the original intent of project and impact on school sales.

Extension of Grant Agreement

Where an extension of time is required to complete a project; the extension(s) must be received in writing by April 1, 2025. The extension request must contain the following information:

- The length of additional time required to complete project objectives; and a justification for the extension;
- A summary of progress to date (status of project timeline and objectives);
- An estimate of remaining funds on the scheduled expiration date;
- A projected timetable to complete the project for which the extension is being requested;
- Updated workplan from originally submitted project proposal; and
- Signature of the Project Contact

Budget Changes

If it becomes necessary to modify the budget to a lesser amount than originally requested, a request for the change must be submitted to ODA in writing for prior approval. The request for a budget change shall include a description of the change and a justification for the change. Budget change requests will not be accepted after April 1, 2025.

NOTE: a formal amendment to the Budget will be completed only if funds will be transferred between Budget Categories or new activities are being proposed through a scope change. If requested changes affect existing activities only, prior approval in writing is sufficient for the change.

Monitoring Site Visits and Financial Reconciliations

The grant agreement allows ODA to monitor the progress of the project. The ODA may perform a monitoring visit for all grantees before a final payment is approved. ODA may audit or otherwise review the documents and information evidencing a grantee's use of grant funds. For this purpose, the grantee must provide expense receipts, employee timesheets, invoices, and any other supporting documents requested by ODA.

REPORTING REQUIREMENTS

The Department will provide required templates for submission of reports. Recipient must submit a progress and final reports in a timely manner and by dates stipulated in grantee contractual agreement.

The **Progress Report** template is projected to include, at a minimum, the following sections to detail progress after year 1:

1. Project Title (must be approved title and Grant ID #)

2. Expenditures to Date

Using the template provided by ODA - list the expenditures to date for your project by cost category

- Personnel/Labor
 - Contractual Services
- Equipment and Infrastructure
- Matching

3. Activities Performed

Using the template provided by ODA - Address the below sections as they relate to this period of performance.

Accomplishments: Estimate the total percentage (%) of work completed on the project. List your accomplishments for this period of performance and indicate how these accomplishments assist in the fulfillment of your project's objective.

Challenges and Developments: Provide any challenges to the completion of your project or any positive developments outside of the project's original intent that you experienced during this period of performance. If those challenges or developments resulted or will result in corrective actions and/or changes to the project include those as well.

A **Final Report** will be required during the grant period. ODA will provide a final reporting period notice to grantees and will request the following information:

1. Project Title
2. Expenditures to Date
 - a. Personnel/Labor
 - Contractual Services
 - b. Equipment and Infrastructure
 - c. Matching

3. Activities Performed

Using the template provided by ODA - Address the below sections as they relate to this period of performance.

Accomplishments: Estimate the total percentage (%) of work completed on the project. List your accomplishments for this period of performance and indicate how these accomplishments assist in the fulfillment of your project's objective.

Challenges and Developments: Provide any challenges to the completion of your project or any positive developments outside of the project's original intent that you experienced during this period of performance. If those challenges or developments resulted or will result in corrective actions and/or changes to the project, include those.

4. Impact on Oregon Agriculture and School Market

Describe how the project helped you get your Oregon products into the school marketplace (if you were able to during the grant period) and what, if any, remaining activities need to be completed to make a sale to a school. What impacts (social, economic, etc) did your project have on the broader community.

5. **Lessons Learned:** Provide recommendations or advice that others may use to improve their performance in implementing similar projects.

Records Retention

Grant recipients should retain all records relating to the grant for a period of six years after the final financial status report has been received by ODA or until final resolution of any audit finding or litigation.

DEFINITION OF TERMS

Beginning Farmer, Rancher or Seafood Harvester/Fisherman: an individual or entity that has not operated a farm, ranch, or seafood harvest/fishing operation for more than 10 years and that substantially participates in the operation of the farm, ranch, or seafood/fishing operation, as the case may be (2017 Census of Agriculture).

Disadvantaged Business Enterprise: is a small business where at least 51 percent of which one or more socially and economically disadvantaged individuals own; or at least 51 percent of the stock of which, if the small business concern is a corporation, is owned by one or more economically disadvantaged individuals who also control and manage the daily business operations of the small business concern.

[ORS.200.005\(3\)\(a\)\(b\).](#)

Emerging Small Business: means an independent business concern that (a) Has a principal place of business located in this state; (b) Qualifies as a tier one firm or a tier two firm; (c) Is properly licensed and legally registered in this state; and (d) Is not a subsidiary or parent company that belongs to a group of firms that the same individuals own or control if, in the aggregate, the group of firms does not qualify as a tier one firm or a tier two firm. [ORS.200.005\(5\)\(a-d\)](#)

Minority Individual: means an individual who is a citizen or lawful permanent resident of the United States and is (a) African American, having origins in any of the original peoples of Africa; (b) Hispanic, having Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race; (c) Asian American,

having origins in any of the original peoples of East Asia, Southeast Asia, the Indian subcontinent or the Pacific Islands; (d) Portuguese, having Portuguese, Brazilian or other Portuguese culture or origin, regardless of race; (e) American Indian or Alaska Native, having origins in any of the original peoples of North America; or (f) Any other individual or member of another group that the Certification Office for Business Inclusion and Diversity determines is socially and economically disadvantaged.

[ORS.200.005\(6\)\(a-f\)](#)

Minority-Owned Business: or woman-owned business or business that a service-disabled veteran owns is a small business where a) at least 51 percent of which one or more minority individuals, women or service-disabled veterans own and control; or b) at least 51 percent of the stock of which, if the small business concern is a corporation, is owned by one or more minority individuals, women or service-disabled veterans who also control and manage the daily business operations of the small business concern.

[ORS.200.005\(7\)\(a\)\(b\).](#)

Service-disabled veteran: a veteran who has a United States Department of Veterans Affairs disability rating of at least zero percent as a result of an injury or illness that the veteran incurred, or that was aggravated, during active military service and who received a discharge or release under other than dishonorable conditions. [ORS.200.005\(9\).](#)

Small to Medium-Sized Farmer, Rancher, or Seafood Harvester/Fisherman: a) an individual or entity that operates a farm or ranch operation or b) a seafood harvester or fisher legally authorized to take food fish for commercial purposes in Oregon; and has a gross cash farm income (GCFI) of crops, livestock and seafood/fish less than \$350,000 for small family farms and GCFI between \$350,000 and \$999,999 for mid-size family farms. GCFI includes the producer's sales of crops and animals, fees for delivering commodities under production contracts, government payments, and farm-related income (2017 USDA Census of Agriculture, Oregon Department of Fish and Wildlife, National Oceanic Atmospheric Association).

Tribal Enterprise: The term ‘Tribal enterprise’ means a commercial activity or business managed or controlled by an Indian Tribe. [25 USC § 4302\(10\)](#).

FAQs

FAQs will be available on the ODA Farm to School webpage at <https://oda.direct/F2S> and will be updated periodically during the open RFA cycle.

CONTACT INFORMATION AND ASSISTANCE

For questions about eligible applicants, eligible projects, allowable costs, food sponsors, and grant related questions please contact: f2sgrant@oda.oregon.gov

For more information about the ODA Farm to School Program please contact Amy Gilroy at amy.gilroy@oda.oregon.gov or 503-709-5360.



Appendix A

PROPOSAL FORM

Name of Applicant:	Grant Contact (Daily contact for project):
Business/Organization/Tribal Enterprise:	Name/Title:
Mailing Address:	Email:
Applicant Email:	Phone:
Applicant Phone:	
Project Title:	

To be eligible for the F2S EI Grant Program you must be one of the following: a) an individual producer, b) for profit business, or c) agricultural cooperative whose primary function involves producing, processing, packaging and distributing of food service products produced or processed in Oregon, or some combination of.

1. YOU MUST ANSWER "YES" TO AT LEAST ONE OF THE QUESTIONS BELOW TO BE ELIGIBLE FOR FUNDING.

Are you a fisherman or producer who cultivates crops, gathers edible plants, or raises livestock on borrowed, leased, public or privately-owned land, or tribal lands?

Yes No

Are you an Oregon for profit business, tribal enterprise, agricultural cooperative, or non-profit that sources not less than 51% Oregon produced product for: (i) eligible entities under the ODE procurement grant program ([ORS.336.431\(3\)\(a\)](#)) or (ii) Tribal schools, Tribal Early Learning/Childhood Education sites, and other Tribal youth meal programs?

Yes No

2. CONFIRM THE FOLLOWING STATEMENTS APPLY TO YOUR BUSINESS.

- Your business is in good standing with the State of Oregon including compliance with current state regulations, acceptable performance in past ODA grant programs, and financially solvent.
- Your business is in Oregon or authorized to conduct business in Oregon.
- No work has started on the proposed project nor will start until notification of award.

3. TELL US ABOUT YOUR EXPERIENCE SELLING TO SCHOOLS.

- I have sold to schools for more than 5 years. (20% Match Requirement)
 - I have sold to schools for 1-4 years. (15% Match Requirement)
 - I have no experience selling to schools and would like to start. (10% Match Requirement)
-

4. WHAT ARE YOU APPLYING FOR?

- Equipment only
 - Infrastructure only
 - Equipment and Infrastructure
-

5. TELL US ABOUT YOUR FOOD SAFETY PRACTICES, LICENSES, AND CERTIFICATIONS. CHECK ALL THAT APPLY.

- GAP/GHP certified
- On - farm food safety plan
- FSMA Produce Safety Training Certificate
- I have the appropriate food safety license for my food or agriculture business
- I am a new or beginning producer or business and intend to meet food safety requirements if awarded funds



6. TO ENSURE EQUAL OPPORTUNITY AND TRACK PROGRAMMATIC OUTCOMES, WE ENCOURAGE YOU TO IDENTIFY IF YOU ARE YOU A PRODUCER OR PROCESSOR THAT IDENTIFIES AS ANY OF THE CATEGORIES BELOW. SUBMISSION OF THIS INFORMATION IS VOLUNTARY AND YOU MAY CHECK ALL THAT APPLY. PLEASE REVIEW THE DEFINITION OF TERMS SECTION ON PAGE 23 IN THE GUIDELINES DOCUMENT.

- A business defined by Oregon Certification Office for Business Inclusion and Diversity ([ORS 200.005 COBID](#)) (check all that apply):
- disadvantaged business enterprise
 - minority-owned business
 - woman-owned business
 - emerging small business
- A person of color
- Female
- Person with a Disability

7. ARE YOU A PRODUCER OR PROCESSOR THAT IDENTIFIES AS ANY OF THE CATEGORIES BELOW? PLEASE REVIEW DEFINITION OF TERMS ON PAGE 23 IN THE GUIDELINES DOCUMENT TO DETERMINE IDENTITY. TO RECEIVE POINTS YOU MUST MEET THE DEFINITION OF THE CATEGORY YOU SELECT.

- Small Farmer, Rancher or Seafood Harvester/Fisherman
- Beginning Farmer, Rancher or Seafood Harvester/Fisherman
- Business that a service-disabled veteran owns

8. HOW DID YOU HEAR ABOUT THE ODA FARM TO CHILD NUTRITION EQUIPMENT AND INFRASTRUCTURE GRANT PROGRAM? CHECK ALL THAT APPLY.

- ODA announcement Word of Mouth Notification from another organization



Executive Summary

Include a brief description of the project and goals you expect to accomplish. The executive summary will be disseminated for public use if awarded. (minimum 50 words, maximum 100 words)

Project Start Date _____ Project End Date _____

Total Grant Request: _____

Total Project Cost (including Match): _____

A. Business/Organization Background Provide a summary of your business or organization including mission and goals, leadership and ownership structure and products/services provided by your organization or business. (minimum 100 words, maximum 250 words)

B. Experience selling to schools Describe your experience selling to schools. Include past or current accounts with schools, provide a description of products you have sold to schools, and how long you have sold to schools (in years). Include the percentage of your agricultural sales from schools over the past five years.

If you have not sold to a school district in the past, describe the schools, summer sites, early child care centers, or tribal groups you intend to sell to and describe how you will work together if your project is awarded. (minimum 250 words, maximum 500 words)

C. Equipment and Infrastructure Needs Provide a description of your proposed project and describe the type of equipment and/or infrastructure needs to help you sell or expand your sales of Oregon grown or processed products to eligible entities under the ODE Farm to School Procurement Program ([ORS.336.431\(3\)\(a\)](#)) and tribal groups. Include the names of suppliers/vendors that carry the types of equipment or infrastructure in your proposed project and describe the type of customized equipment or infrastructure you need if applicable. Describe how the equipment or infrastructure will increase your production or processing capacity for your project and how the

project will be managed by your business/organization. (minimum 500 words, maximum 1000 words)

D. Business Readiness and Financial Sustainability Describe the financial health/cash flow of your organization over the past three years. Explain how this proposed project fits into your business plan including how this project will financially benefit your business/organization. **Do not** include confidential business information or trade secrets in this section. (minimum 500 words, maximum 1000 words)

E. Impact on Oregon Agriculture and School Market Access Describe how your proposed project will increase the sale of Oregon grown or processed products to school markets. Describe the anticipated social, community and economic impacts your project will have. Describe the timeframe in which you expect you'll execute sales to school(s). (minimum 250 words, maximum 500 word

F. Matching Funds Describe how you intend to meet the match requirement for your project and track your progress towards the match requirement. (minimum 100 words, maximum 250 words)

G. Food Safety All applicants will be asked to meet a level of food safety consistent with their farm or business operations. Applicants will be expected to work with ODA to determine what food safety schemes are best suited for their farm or business. If you do not know what food safety requirements may be necessary for your proposed project, call ODA Food Safety at 503-986-4720 or visit [Find my Food Safety Inspector](#) to find a local food safety specialist in your community. Applicants identifying as tribal enterprises or tribal producers should consult with their respective Tribal regulatory authority on requirements to manufacture, distribute and sell food products on and off tribal lands.

Applications will not be evaluated based on current food safety practices or certifications, and applicants may use funds for costs to obtain necessary food safety requirements for proposed projects. However, applicants must clearly address food safety in their proposal. Describe your food safety plan and any current certifications or licensure you have to sell into institutional, retail, wholesale or export markets. If you do not have a food safety plan, describe what you need or how you will implement a food safety plan or practice in your proposed project. (minimum 250 words, maximum 1000 words)

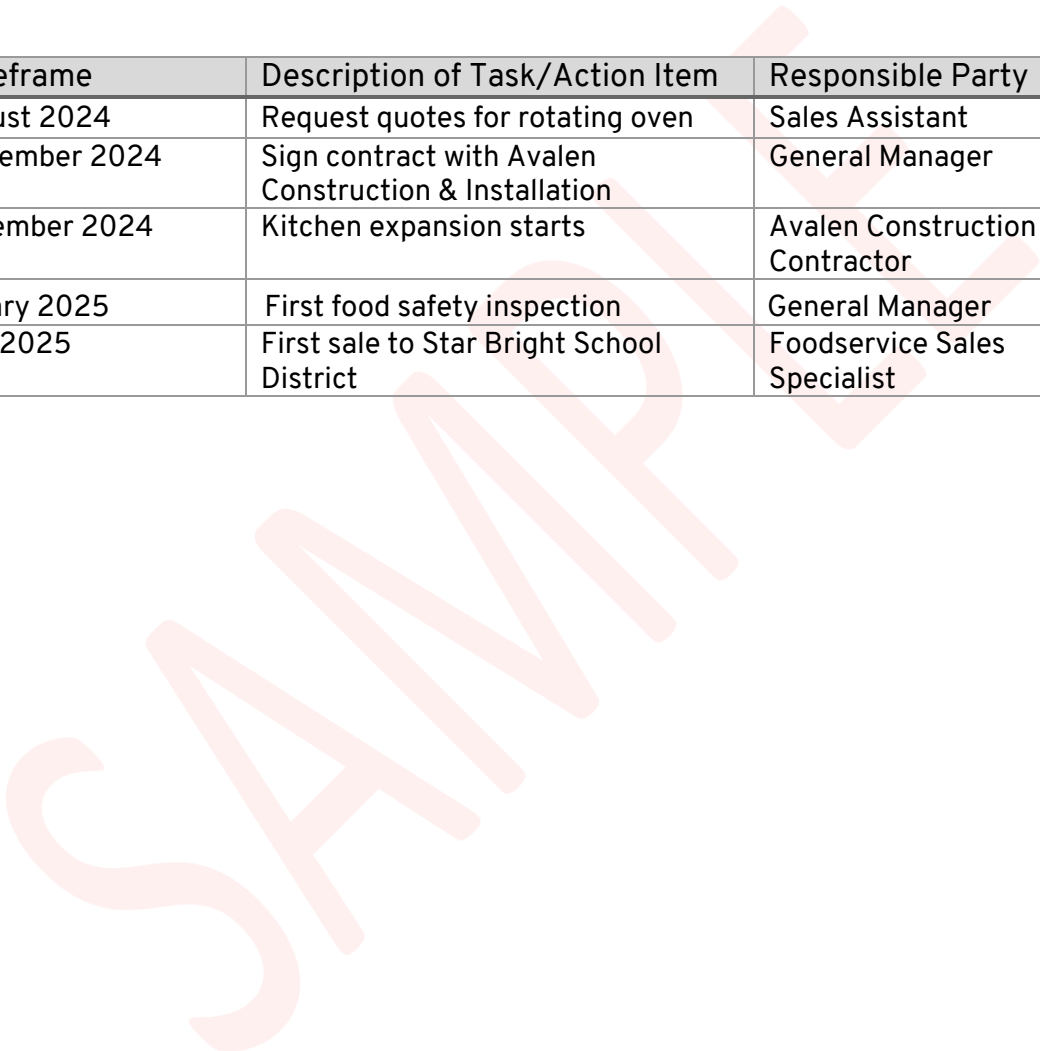


Appendix B

WORK PLAN

SAMPLES ONLY

Timeframe	Description of Task/Action Item	Responsible Party
August 2024	Request quotes for rotating oven	Sales Assistant
September 2024	Sign contract with Avalen Construction & Installation	General Manager
November 2024	Kitchen expansion starts	Avalen Construction Contractor
January 2025	First food safety inspection	General Manager
May 2025	First sale to Star Bright School District	Foodservice Sales Specialist





Appendix C

BUDGET DETAIL

SAMPLES ONLY

Personnel Costs

Name/Position	Level of Effort (# of hours OR % FTE)	Funds Requested
Joe Smith, General Manager	20 hours @ \$75/hr	\$1,500
Personnel, General Manager Joe Smith	Labor for construction of kitchen expansion and installation of new equipment (20 hrs @ \$100/hr)	\$0
TOTAL		\$3,500

Fringe Benefits

Name/Position	Fringe Benefit Rate	Funds Requested
Joe Smith, General Manager	20 hours @\$25/hr	\$500
TOTAL		\$500

Equipment and Infrastructure Costs

Item	Quantity	Cost Per Unit	Total Estimate	Funds Requested	Source of Estimate
R 15 Vertical Cutter Mixer	1	\$9,000	\$9,000	\$9,000	Robot Coupe
Buffalo Chopper	1	\$2,500	\$2,500	\$2,500	Chop Chef
Continuous Feed Processor 2000	2	\$500	\$1,000	\$1,000	Avantico
Rotating Oven	1	\$30,000	\$30,000	\$30,000	Univex
Walk in Cooler	1	\$15,000	\$15,000	\$15,000	Hobart
QC software system	1	\$500	\$500	\$500	Metronics
TSM Dehydrator	1	\$5500	\$5500	\$0	Univex
TOTAL			\$63,500	\$58,000	

Supplies Costs

Item	Quantity	Cost Per Unit	Total Estimate	Funds Requested	Source of Estimate
Connectors	10	\$15	\$150	\$150	Hardware Supplies, Inc
Fittings	10	\$15	\$150	\$150	Hardware Supplies, Inc
Mounting hardware kit	1	\$30	\$30	\$30	Hardware Supplies, Inc
Circuit cables	5	\$12	\$60	\$60	Hardware Supplies, Inc
Fan exhaust attachment	2	\$20	\$40	\$40	Hardware Supplies, Inc
TOTAL			\$430	\$430	

Contractual Costs

Item	Quantity	Cost Per Unit	Total Estimate	Funds Requested	Source of Estimate
Labor Avalen Construction	1	\$100/hr @20	\$2,000	\$2,000	Avalen Construction quote
TOTAL			\$2,000	\$2,000	

Other Costs

Item	Quantity	Cost Per Unit	Total Estimate	Funds Requested	Source of Estimate
Food Processing Establishment Licensing Fee	1	\$474	\$474	\$474	
Food Storage Warehouse Licensing Fee	1	\$139	\$139	\$139	
TOTAL			\$613	\$613	

Matching Funds

Expense Category	Description	Cash	In-kind
Personnel, General Manager Joe Smith	Labor for construction of kitchen expansion and installation of new equipment (20 hrs @ \$100/hr)		\$2,000
Equipment	Purchase of TSM commercial dehydrator	\$5,500	
Subtotals		\$5,500	\$2,000
TOTAL = \$7,500			

Budget Summary

Cost Category	Estimated Cost	Funds Requested	Match
Personnel	\$4,000	\$2,000	\$2,000
Equipment & Infrastructure	\$63,500	\$58,000	\$5,500
Supplies	\$430	\$430	\$0
Contractual	\$2,000	\$2,000	\$0
Other (i.e. food safety certification fees)	\$613	\$613	\$
TOTAL	\$68,543	\$61,043	\$7,500
TOTAL MATCH = \$7,500 (12%)			
TOTAL FUNDS REQUESTED: \$61,043			
TOTAL ESTIMATED COST (Funds Requested + Match) = \$68,543			



Appendix D

Letter of Intent to Buy



Letter of Intent to Buy

Date: February 2, 2024

Project Title: Fresh Veggies for Healthy Kids at Valley Butte School District

Name of School, Tribe, Early Child Care Center or Summer Meal Site: Valley Butte School District

Describe how this project will contribute to your effort to source Oregon producers in your student meal programs: Valley Butte School District's goal is to source seasonal fruits and vegetables from Oregon year-round. By investing in Trillium Farm's project, the farm will be able to provide fresh greens in the late summer and early fall to our students and root vegetables in the winter and spring months. The seasonal extension equipment and infrastructure will allow them to keep perishable products fresher longer and package it in a convenient form for our school cafeteria.

Oregon product(s) description and standards: Baby greens, heading greens, bunched greens, carrots, beets, and potatoes.

Volume of product: Greens: Up to 600 pounds/year Roots: Up to 1000 pounds/year

Estimated frequency of purchases and delivery: Greens - weekly; August - September Roots - biweekly; January - March

How many students reached or meals served with product: 850 student meals daily

Intent to Buy Agreement

By signing this document, the Valley Butte School District manifests its intent to purchase products identified in this letter at a price negotiated with Trillium Farm. Both parties will make a good faith effort to execute the sale of product(s) as described in the terms above by December 31, 2025.

Signature of School Food Authority or Tribal Representative Date
[Signature] 02/10/2024

Signature of Applicant Date
[Signature] 02/11/2024

Appendix E

SCORESHEET

Project #: _____

Reviewer #: _____

Date: _____

Criteria	Reviewer Score	Points Available	Notes
<p><u>Business Mission and Financial Standing.</u> 5 points each.</p> <ul style="list-style-type: none"> - Business/Organization is financially solvent and capable of school market expansion - Products that business produces (or intends to) meet school market demand 		10	
<p><u>Project Purpose and Business Readiness.</u> 10 points each.</p> <ul style="list-style-type: none"> - Business sets forth a project with clear business goals to meet school market demand - Business has identified specific equipment and/or infrastructure improvements needs - Business provides an achievable project workplan and timeline 		30	
<p><u>Impact on Oregon Agriculture and School Market.</u> 10 points each.</p> <ul style="list-style-type: none"> - Partnering food sponsors are identified and supportive of project (Letter of Intent to Buy) - Project demonstrates a realistic increase in sales of Oregon agricultural products to schools and the timeframe for executing the sale is clear - Applicant has described the social, community and economic benefits of the project 		30	
<p><u>Budget and Matching Funds.</u> 4 points each.</p> <ul style="list-style-type: none"> - Budget clearly identifies sources of estimated costs for equipment and/or infrastructure - Budget is financially feasible - Budget is detailed enough to provide picture of how grant funds will be used to implement project - Project includes matching funds related to the project - It's clear how matching funds will be tracked throughout the project 		20	
<p><u>Diversity and Inclusion.</u> 5 points each.</p> <ul style="list-style-type: none"> - Applicant is a small to medium sized farmer, rancher or seafood harvester/fisherman - Applicant is a beginning farmer, rancher, or seafood harvester/fisherman - Applicant is a service-disabled veteran 		15	
TOTAL		115	



**OREGON
DEPARTMENT OF
AGRICULTURE**

Farm to School Program

635 Capitol St, NE, Salem, OR 97301-2532

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