

Roadmap to 30% NY

Use this guidance to help you set and monitor local procurement goals.

→ STEP 1: Assess Your Local Procurement

1. Find your “Magic Number” (an estimate of what 30% of your lunch purchases would be)
 - a. Use State Ed [“30% Calculation Tool”](#)
 - b. Enter numbers from last completed school year for a good estimate
2. Find your estimated MILK purchases
 - a. Ask your dairy company for velocity reports, and subtract any non-NY items, ex. Juices
 - b. Use past milk counts for LUNCH only count estimates
 - c. Include any other dairy products used only at lunch, like cheese sticks
 - d. If you can’t come up with this quickly, assume ~18-20% of your budget is dairy
3. Find your estimated APPLE purchases (assuming you only purchase NY apples)
 - a. # cases purchased/week X 36 weeks X cost per case = Apple purchases
4. Identify other items you procure that are definitely NY, and apply a version of the apple formula
 - a. Ex. You purchase NY potatoes October-March: 50lb/month x 6 months x \$25/bag = \$7,500
5. Find your target goal for additional procurement using the following formula:

$$\begin{aligned} &\text{Your Magic Number (30\% goal spend)} \\ &[\text{MINUS}] \text{ Milk/Dairy estimate} \\ &[\text{MINUS}] \text{ Apple estimate} \\ &[\text{MINUS}] \text{ Other NY items estimate} \\ &\hline &= [\text{Your target spending goal to reach 30\% NY}] \end{aligned}$$

Target Spending Goal Formula

Example

[Your Magic Number]	\$14,072
MINUS [milk/dairy estimate]	- \$11,168
MINUS [apple number]	- \$1,340
MINUS [other NY items]	- \$80
= [Your target spending goal to reach 30% local food procurement]	= \$1,520

→ Step 2: List All NY Food Items & Estimate Total Purchases

1. Create a spreadsheet in Excel and list all potential NY products, the distributor, the unit, and the price/unit or use [this template](#)
2. Add estimated quantities based on previous usage, your comfort level using new products, and price
3. Compare the total from the spreadsheet to your target spending goal
 - a. To be safe, plan to be at 32% procurement
 - b. If estimate is too LOW, plan to increase purchases
 - c. If estimate is too HIGH, you might be okay but adjust accordingly throughout the year

→ **Step 3: Plan Your Local Purchases**

1. Talk with your distributor about your plans
2. Make sure to plan menus around purchasing goals
3. Mind procurement regulations
 - a. Does this fall under the micropurchase threshold?
 - b. Do I need a special bid for this item?
 - c. Do I need to change bid language?

→ **Step 4: Track Your Local Purchases**

1. Choose a [purchase tracker](#), or create your own
2. Input purchases on at least a monthly basis
3. Fill out the [30% Calculation Tool](#) monthly with your actual to-date data for that school year

*Thank you to Cornell Cooperative Extension of Allegany County for developing the original "Roadmap to 30%" to assist schools in achieving local procurement goals.
This guidance was adapted from their model.*