

Appendix D1. SFA Procurement Practices Web Survey

SFA Procurement Practices Web Survey

You have been selected to participate in an important study. For the “Study of School Food Authority (SFA) Procurement Practices,” 2M Research (2M) is conducting a survey for the U.S. Department of Agriculture (USDA) Food and Nutrition Service (FNS). FNS has commissioned this study to describe and assess SFA practices related to procuring goods (specifically food) and services for the following Child Nutrition programs: The National School Lunch Program (NSLP); School Breakfast Program (SBP); Fresh Fruit and Vegetable Program (FFVP); Summer Food Service Program (SFSP); and Child and Adult Care Food Program (CACFP). FNS is seeking to better understand how SFAs make decisions that shape their procurement practices.

The purpose of the SFA Procurement Practices Web Survey (the web survey) is to gather information about your SFA’s procurement practices. This web survey has five sections in regard to (1) the types of solicitations and contracts your SFA uses; (2) your procurement methods; (3) your food sources, including, but not limited to, USDA Foods and food from local sources; (4) planning, decision-making and procurement monitoring; and (5) types of guidance and training used by your SFA, and best practices. Survey findings will describe similarities and differences in how SFAs procure goods (specifically food) and services, which will help FNS understand key issues and experiences of SFAs.

Please answer as openly and honestly as possible. Your answers will be kept private; individual names will not be used in any reports, and only aggregated results will be reported. Your participation in this web survey will not affect your employment or your SFA’s participation in any Child Nutrition programs. We encourage you to work with other staff in your SFA if you do not have answers to some of the questions.

The web survey is designed to be completed in approximately 90 minutes. We encourage you to complete the web survey as soon as possible. As you respond to survey questions, please note the following:

- **Do not use your browser’s “back” button** during the survey. Instead, use the “Back” button at the bottom of each screen if you need to return to a previous question.
- Hovering your cursor over highlighted text will show more information about the term.
- Please respond to all questions to the best of your ability.
- Unless you see the words “select all that apply” after a question, please select only one response for each question.
- As you complete survey sections, click “Save & Continue” at the end of each page to save your responses.
- After saving, you can exit the survey by closing the browser.
- You can return to the survey by using the same link.

If you have any questions or concerns about the study, please do not hesitate to contact the help desk at sfaprocurement@2mresearch.com or call toll free at 1-844-250-1911. Thank you for your participation in this important survey.

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0584-XXXX. The time required to complete this information collection is estimated to average 90 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

Section I. Solicitations and Contracts

In this section, we want to understand the ways your SFA procures goods (specifically food) and services for Child Nutrition programs (i.e., NSLP, SBP, FFVP, SFSP, and CACFP) for school year (SY) 2017–2018. Please focus on **SY 2017-2018** and include solicitations that were newly developed or developed for active contracts, and newly-awarded and active contracts. We are interested in contracts solicited by self-operating SFAs, as well as for Food Service Management Companies (FSMCs) and contracts procured under an intergovernmental/interagency agreement, agent, or third party.

1. Please indicate the Child Nutrition program(s) in which your SFA participates.

Select all that apply:

(Programmer Note: Do not allow respondent to select any other responses if “none” is selected.)

- NSLP
- SBP
- FFVP
- SFSP
- CACFP
- None

The next questions are about your procurement solicitation methods.

2. During SY 2017–2018, what procurement solicitation methods did your SFA use to procure goods (specifically food) and services for Child Nutrition programs at your SFA’s schools? Examples of goods and services include food, equipment, and supplies purchased for use in Child Nutrition programs, or personnel hired to prepare and serve food for Child Nutrition programs.

Select all that apply:

- Procurement by sealed bids (i.e., an invitation for bids)
- Procurement by competitive proposals (i.e., using a Request for Proposals process)
- Procurement by micro-purchasing
- Procurement by small purchase procedures
- Procurement by noncompetitive proposals

3. What factors influenced which procurement solicitation methods your SFA used to procure goods (specifically food) and services?

Select all that apply:

- Administrative capacity for developing contracts
- Amount of time available to plan the procurement
- Brands that are available
- Complexity of the purchase

- Estimated cost
- Duration of the contract
- Kind/variety of foods available
- Local regulations
- Pre-approval of vendor by State agency or USDA
- Purchase quantity
- SFA district size
- Specific standards that need to be met for products
- Specific standards that need to be met for the Child Nutrition programs
- State Regulations
- Other (Specify): _____
- Other (Specify): _____
- Other (Specify): _____

This next set of questions is about the types of contracts your SFA awarded through procurement solicitation methods for SY 2017–2018. SFAs may award different types of procurement contracts, including the following:

- *Fixed-price contracts* provide a stated price that is fixed without any adjustment for the duration of the contract.
- *Fixed-price contracts with economic price adjustment* provide for upward and downward adjustment of the stated contract price that is fixed for a period of time and adjusted based on an economic indicator such as the Consumer Price Index.
- *Cost-reimbursable contracts* reimburse the vendor for costs incurred, and they may (or may not) include a fixed fee for management or administrative services if included in the solicitation language.

4. Which type(s) of contract(s) did your SFA award for SY 2017–2018 for procured goods (specifically food) and services?

Select all that apply:

- Fixed-price contracts
- Fixed-price with economic price adjustment contracts
- Cost-reimbursable contracts (no fixed fee)
- Cost-reimbursable with fixed-fee contracts
- Other (Specify): _____

5. Forward contracts include an agreement between parties to buy a product at a specified price on a future date. For example, an SFA may contract with a farmer or producer to provide a product at a set price before it has been produced. Did your SFA use forward contracts in SY 2017–2018?

- Yes
- No
- Don't Know/Unsure

6. Do State or local regulations limit your SFA to using specific types of contracts (e.g., fixed-price, cost-reimbursable, forward contracts)?

- Yes
- No
- Don't Know/Unsure

7. What factors influence which contract type your SFA awards for procuring goods (specifically food) and services? Please rank the three most important factors by indicating the most important factor with a "1," the second most important with a "2," and the third most important with a "3."

____ Consistency in product

____ Quality of service

____ Type of service

____ Level of administrative burden and oversight required

____ Level of contract oversight required

____ Level of risk (other than type of pricing such as length of contract)

____ Previous experience

____ Small purchase and micro-purchasing thresholds

____ Type of pricing (fixed, reimbursable)

____ Quantity purchased

____ Estimated cost

____ Other (Specify): _____

____ Other (Specify): _____

____ Other (Specify): _____

The next questions are about formal and informal (**including micro- and small purchases**) procurement. SFAs utilize formal and informal procurement procedures as described in the table below:

Formal Procurement	(1) developing the solicitation; (2) publicly announcing/advertising the solicitation; (3) evaluating offers; (4) negotiating and awarding the contract; and (5) managing the contract
Informal Procurement	(1) developing the solicitation; (2) identifying potential vendors to obtain more than one bid/offer/quote; (3) evaluating responses; (4) negotiating and awarding the contract; and (5) managing the contract

8. Most contracts include specifications for products and services, payment terms, and other required contract provisions and conditions. Please indicate any additional contract provisions that are integrated in your **formal** or **informal** procurement (*including micro- and small purchases*) for school foods by checking the applicable boxes in the list below. **(Programmer Note: Do not allow respondent to select any other responses in a column if “none” is selected in that column.)**

Contract Provision	Formal Procurement	Informal Procurement
Small Business	<input type="checkbox"/>	<input type="checkbox"/>
Minority-owned business	<input type="checkbox"/>	<input type="checkbox"/>
Woman-owned business	<input type="checkbox"/>	<input type="checkbox"/>
Geographic preference	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>

The next set of questions is about the availability of various forms, such as “how-to” instructions or recommendations, templates, or lessons learned, that may have been developed by your State Agency.

9. Does your State Agency provide contract language or templates for FSMC contracts with SFAs?

- Yes
- No
- Don't Know/Unsure

10. Does your State Agency provide contract language or templates for SFA contracts with processors, including USDA Foods processors?

- Yes
- No
- Don't Know/Unsure

11. Does your State Agency provide contract language or templates for SFA contracts with broadline distributors? Broadline distributors (also known as general-line or full-line distributors) are a type of merchant grocery wholesale company that handles a variety of food and supply products, and other food service materials.

- Yes
- No
- Don't Know/Unsure

The Buy American provision requires SFAs participating in the NSLP or SBP, to the maximum extent practical, to buy agricultural commodities produced in the United States and to buy food products processed in the United States using agricultural commodities, and at least 51 percent of the final processed product consists of domestically grown agricultural commodities, by weight or volume.

12. How do you acquire the majority of your products?

- Manufacturers
- Distributors
- Suppliers
- Farmers
- Don't Know/Unsure

13. What methods/processes does your SFA use to ensure that your SFA complies with the Buy American provision?

(Programmer Note: Do not allow respondent to select any other responses if “None of the above” or “Don’t Know/Unsure” is selected.)

Select All that Apply:

- Include Buy American or “domestic” clause in *product specifications for food*
- Include Buy American or “domestic” clause in *bid solicitations for food*
- Include Buy American or “domestic” clause in *requests for proposals for food*
- Include Buy American or “domestic” clause in *purchase orders for food*
- Include Buy American or “domestic” clause in *other procurement documents for food*
- Request *distributors, manufacturers, or suppliers* provide certification of the origin of their food products
- Have a process for a *distributor, manufacturer, or supplier* to request permission to substitute a non-domestic food product for a domestic product
- Require *distributors, manufacturers, or suppliers* to provide documentation showing exceptions for supply of non-domestic food products
- Examine food product packaging provided by the *distributor, manufacturer, or supplier*
- Inquire with the *distributor, manufacturer, or supplier* about the origin of the food product
- Monitor contractor performance to ensure compliance with “domestic” foods
- Require certification of domestic content of food components
- Other (Specify): _____
- None of the above
- Don’t Know/Unsure

14. How does your SFA verify that the domestic commodity or product that was solicited and awarded is the food received?

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- Identify people within the SFA responsible for receiving goods (specifically food) and services
- Examine goods (specifically food) or services, invoices, and documentation provided by contractor
- Request certification identifying the percent of U.S. content in supplied commercially procured foods
- Review applicable contractor certification records
- Review compliance reports
- Other (Specify) _____
- Don’t Know/Unsure

Section II. Procurement Methods

Questions in this section are about procurement management practices with respect to your SFA's use of FSMCs and/or participation in group purchasing entities (cooperatives, agents, third-party entities).

In the following questions, we want to understand the ways that your SFA may be using an FSMC to procure goods (specifically food) or services for your Child Nutrition programs for SY 2017–2018.

1. Did your SFA use an FSMC to procure goods (specifically food) or services for your Child Nutrition programs for SY 2017–2018?
 - Yes
 - No (skip to Question 10)

2. Did the FSMC(s) manage one, some, or all aspects of procurement for your SFA's Child Nutrition programs? Please consider all aspects of procurement, such as contracting for meal preparation, program administration, procuring processing for bulk USDA Foods items, and ordering processed USDA Foods, as well as services such as menu planning, and hiring, managing, and supervising personnel. For example, your SFA may contract with an FSMC for meal preparation, but not for procurement services.
 - Only one aspect
 - Some, but not all, aspects
 - All aspects
 - Don't Know/Unsure

3. How long has your SFA used an FSMC in any capacity?
_____ (number of years)
 - Don't Know/Unsure

4. Did your SFA contract with one FSMC or groups of FSMCs in SY 2017–2018?
 - Only one FSMC (skip to Question 6)
 - Groups of FSMCs

5. How many FSMCs did your SFA contract with for SY 2017–2018?
_____ (number of FSMCs)
 - Don't Know/Unsure

6. Of the **NUMBER** of FSMCs your SFA contracts with for SY 2017–2018, how many of those contracts include other SFAs?
_____ (number of FSMC contracts that include other SFAs)
 - Don't Know/Unsure

7. Why did your SFA decide to use the services of an FSMC?

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- FSMCs coordinate all aspects of the procurement process
- FSMCs find year-round availability of key food products
- FSMCs coordinate procurement of local foods with regular procurement
- FSMCs provide a wider variety of local goods (specifically food) than vendors
- FSMCs offer lower prices than vendors
- FSMCs offer more consistent prices than vendors
- My SFA lacks the kitchen equipment to process/prepare foods
- FSMCs help my SFA maintain compliance in procurement regulations and policies
 - FSMCs provide goods (specifically food) and services on time and resolve any delivery issues
 - FSMCs procure products that meet SFA specifications, including Buy American requirements
 - FSMCs hire staff which reduces SFA personnel oversight and costs
 - My SFA lacks the personnel to administer program operations for break-even or positive cash flow
 - My SFA is challenged with expertise to plan, prepare, and serve nutritious food and meals
 - My SFA is challenged with the ability to attract and retain qualified staff to administer and operate the program
 - My SFA has used an FSMC in the past
 - The FSMC was already in use when I began working for my SFA
 - The FSMC is directed by district leadership
 - Other (Specify): _____
 - Don’t Know/Unsure

8. How did your SFA learn about available FSMCs?

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- State Agency
- Local Education Agency
- School officials (e.g., board members, district administrators)
- Issued a Request for Information
- Advertised solicitation for FSMC services
- Other SFAs
- Approached by FSMC(s)
- Advisory group
- The FSMC was already in use when I began working for my SFA
- Other (Specify): _____
- Don’t Know/Unsure

9. How does your SFA monitor FSMC performance after award? An example of “performance monitoring” would be monitoring to ensure that the FSMC has provided domestic foods as required by the contract.

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- Identify people within the SFA responsible for receiving goods (specifically food) and services
- Examine goods (specifically food) or services, invoices, and documentation provided by the FSMC
- Request certification identifying the percent of U.S. content in supplied commercially procured foods
- Review applicable FSMC certification records
- Review compliance reports
- Other (Specify) _____
- Don’t Know/Unsure

10. Please indicate the Child Nutrition program(s) for which your SFA combined the procurement of any **food, supplies, equipment** or **services** in SY 2017–2018 by checking the applicable boxes in the table below. An example of combining would be to use the same procurement (e.g., small purchases, micro-purchases, formal IFB/RFP, FSMCs) to obtain milk for both NSLP and SBP, or hire a single FSMC for all food service programs operated.

(Programmer Note: Do not allow respondent to select any other responses in a column if “none” is selected in that column. If they do not select “none” in a column, do not allow respondent to select only one Child Nutrition Program – NSLP, SBP, FFVP, SFSP, CACFP or Other – in a column.)

Child Nutrition Program	Food	Supplies	Equipment	Services
NSLP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SBP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FFVP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SFSP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CACFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the following questions, we want to understand the ways that your SFA may have used group purchasing entities (cooperatives, group purchasing organizations, group buying organizations, agents, and third-party entities) to procure goods (specifically food) and services for your Child Nutrition programs for SY 2017–2018.

11. Did your SFA participate in any group purchasing entities (cooperatives, group purchasing organizations, group buying organizations, agents, and third-party entities) to procure goods (specifically food) for any Child Nutrition programs for SY 2017–2018?

- Yes (skip to Question 13)
- No

12. Was your SFA interested in participating in a group purchasing entity but found none available?

- Yes (skip to Question 15)
- No (skip to Question 15)

13. Did your SFA voluntarily join any of these group purchasing entities?

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- Yes
- No
- Don’t Know/Unsure

14. Did any of these group purchasing entities procure local products for your SFA in SY 2017-2018?

- Yes
- No

These next questions ask specifically about **interstate** group purchasing entities (cooperatives, group purchasing organizations, group buying organizations, agents, third-party entities). An **interstate group purchasing entity** is usually a group purchasing organization or third-party entity that does not comprise only SFAs and works across States, rather than just within one State. This interstate entity could also be called a “cooperative,” and could be public, private, or a public-private partnership in which the SFA may/may not pay a membership fee or enters into an intergovernmental or inter-entity agreement to purchase common or shared goods and services.

15. Did your SFA belong to an **interstate** group purchasing entity in SY 2017–2018?

- Yes (skip to Question 17)
- No

16. Was your SFA interested in joining an **interstate** group purchasing entity in SY 2017-2018, but found none available?

- Yes
- No

The next questions ask about your SFA's participation in group purchasing entities or programs. These include statewide group purchasing entities (including cooperatives) and programs administered by the State's Office of Child Nutrition and statewide cooperatives that are not administered by the State OCN.

17. Does your *State Office of Child Nutrition* offer a **statewide** group purchasing entity or other statewide purchasing programs?

- Yes
- No

18. Please indicate if your SFA participated in **statewide** purchasing cooperatives or programs in SY 2017-2018.

SFA Participation	Yes	No
Participated in a statewide purchasing cooperative or program administered by your State Office of Child Nutrition	<input type="checkbox"/>	<input type="checkbox"/>
Participated in a statewide purchasing cooperative administered by an agency other than your State Office of Child Nutrition	<input type="checkbox"/>	<input type="checkbox"/>

In the next questions, we are interested in learning what procurement methods were used by your SFA to source products, especially local products, and services for your Child Nutrition programs for SY 2017-2018.

19. Please check boxes in the grid to indicate whether your SFA has sourced foods locally and/or non-locally for any of the product groups listed in the far-left column, through any of the procurement methods or purchasing entities that you identified earlier which are listed in the top row.

[Programmer Note: Only procurement methods selected in Section 1 Question 3 and Section II Questions 1 and 18 will be displayed.]

Select all that apply:

Food Component Groups	Source	Procurement and Purchasing Entities						Group Purchasing Entities (cooperatives and agents that procure using Program and government-wide regulations)	Third Party Group Purchasing Entities (not bound by Program and government-wide regulations)
		Competitive Proposal Methods	Sealed Bid Methods	Small Purchases	Micro-Purchases	FSMCs			
Fruits	Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Non-local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Vegetables & Vegetable Subgroups (legumes, leafy greens, etc.)	Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Non-local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Grains/Grain Products	Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Non-local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Meats/Meat Alternatives and Seafood	Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Non-local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dairy/Fluid Milk	Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Non-local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

20. How does your SFA define "local" for school foods?

- Within a certain number of miles
(If checked, within how many miles does your SFA define local? _____ miles)
- Within your county
- Within your State
- Within your State and adjacent States
- Within your FNS region
- We do not have a set definition
- Don't Know/Unsure

21. Please check boxes in the grid to indicate whether your SFA has sourced any of the goods or services listed in the far-left column through any of the procurement methods or purchasing entities that are listed in the top row for Child Nutrition programs at your SFA's schools for SY 2017–2018.

[Programmer Note: Only procurement methods selected in Section 1 Question 3 and Section II Questions 1 and 18 will be displayed.]

Select all that apply:

Services	Procurement Methods and Purchasing Entities						
	Competitive Proposal Methods	Sealed Bid Methods	Small Purchases	Micro-Purchases	FSMCs	Group Purchasing Entities (cooperatives and agents that procure using Program and government-wide regulations)	Third Party Group Purchasing Entities (not bound by Program and government-wide regulations)
A la carte meal service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
After-school snacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Menu planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing vended meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing food preparation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing services for Child Nutrition programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing meal services at sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing and supervising personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing safety and sanitation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing goods, specifically food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Services	Procurement Methods and Purchasing Entities						
	Competitive Proposal Methods	Sealed Bid Methods	Small Purchases	Micro-Purchases	FSMCs	Group Purchasing Entities (cooperatives and agents that procure using Program and government-wide regulations)	Third Party Group Purchasing Entities (not bound by Program and government-wide regulations)
Purchasing services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing services to convert raw and/or bulk USDA Foods into ready-to-use end products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivery of bulk products for meal preparation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivering meals to sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product storage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site cleanup after meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storing vended meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing nutrition education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing onsite staff to support services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensuring compliance with procurement rules and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section III. Sourcing Foods

This section asks about how your SFA sources foods for Child Nutrition programs, including USDA Foods and foods from local sources, in SY 2017–2018.

1. Does your SFA ever divert USDA Foods for processing?
 - Yes
 - No
2. Does your SFA ever purchase processed items from a State contract?
 - Yes
 - No
3. Does your SFA competitively procure services from manufacturers or processors to convert (process and/or package) USDA Foods into ready-to-use end products for Child Nutrition programs?
 - Yes
 - No
4. How does your SFA competitively procure USDA Foods processed end products for Child Nutrition programs? *By USDA Foods processed end products, we mean USDA Foods that have been sent to a processor and converted into ready-to-use end products.*

Select all that apply:

- Procure directly with manufacturers or food processors that have a National processing agreement with USDA
 - Allow distributors (for example, Sysco or US Foods) to procure finished products
 - Finished items contracted by the FSMC, cooperative purchasing group, and/or group buying organization
 - Procure directly with in-state processors
 - Allow meal vendor (for example, Revolution Foods) to procure finished products
 - Other food source supplier 1 (Specify) _____
 - Other food source supplier 2 (Specify) _____
5. Which *value pass-through methods* does your SFA use to obtain credit for the value of the USDA Foods in processed end-products?

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- Rebates
- Net-off invoices
- Fee-for-service
- Direct discount
- Don’t know/Unsure

The following questions ask about your SFA's procurement of local foods and participation in Farm to School practices in SY 2017–2018.

6. Of your total food costs for Child Nutrition programs in SY 2017–2018, what percentage of costs were spent on foods from local sources? (Please provide your best estimate.)

[Programmer Note: Insert response to II-19 unless response checked is “We do not have a set definition” or “Don’t Know/Unsure.”]

_____ percent

- Don't Know/Unsure
7. What is your SFA's percentage goal for the amount spent on foods from local sources for your Child Nutrition programs?

_____ percent

- Our SFA does not have a percentage goal
- Don't Know/Unsure

8. Please check boxes in the table below to indicate which food purchasing and promotion practices are used by your FSMC (if you contract with one), group purchasing entity (if you participate in one), and your SFA separate from your FMSC or group purchasing entity to support your SFA’s procurement from local sources.

Select all that apply:

(Programmer Note: Only display “Practice used by your FSMC” column if “yes” was selected for Question II-1. Only display “Practice used by your group purchasing entity” column if “yes” was selected for Question II-10. Do not allow respondent to select any other responses in a column if “none” is selected in that column. Do not allow respondent to select any responses in the “Used by your FSMC” column if “we do not contract with an FSMC” is selected in that column. Do not allow respondent to select any responses in the “Used by your group purchasing entity” column if “we do not contract with any group purchasing entities” is selected in that column.)

Food Purchasing and Promotion Practices	Practice used by your FSMC	Practice used by your group purchasing entity	Practice used by your SFA directly (separate from your FSMC and/or group purchasing entity)
Sourcing products using the geographic preference option	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct purchasing from local farmers using small or micro-purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sourcing products from school gardens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promoting garden/agricultural education in the cafeteria	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating and tending to school gardens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting local farms in other ways (Specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting school gardening in other ways (Specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don't Know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Programmer Note: If “none” was selected in all three columns in Question 8, skip to Section IV.)

9. Does your SFA promote any of the above food purchasing or promotion practices as Farm to School activities or initiatives?
- Yes
 - No
 - Don't Know/Unsure

Section IV. SFA Planning and Monitoring

This section asks how your SFA makes decisions to determine its overall procurement process and monitors procurement contracts. You will also be asked for information about your SFA's internal recordkeeping and accounting, FSMCs, and Buy American provision requirements (if applicable) for your Child Nutrition programs for SY 2017–2018.

The following questions focus on the information your SFA uses for its procurement planning process and the individuals that are involved with planning.

1. Does your SFA use internal recordkeeping systems that support forecasting and planning (e.g., tracking daily food sales) to make future procurement decisions?
 - Yes
 - No
2. What big-picture priorities shape your SFA's approach to procurement?

Select all that apply:

- Food service staffing needs
- Food service staffing costs
- Food service equipment and supply **needs**
- Food service equipment and supply **costs**
- Food service operations
- Program management/administration needs
- SFA or school size
- Child Nutrition Program participation rates
- Menu items/variety
- Local wellness policies and nutrition goals
- Input from State Agency and/or State Distributing Agency
- Input from other SFAs
- Input from an advisory council
- Input from the student body
- Input from the community
- Storage capacity
- Regulatory meal pattern requirements
- School board
- Other (Specify): _____

3. Please rank the three most important sources of information your SFA uses to determine its overall methods for procurement by indicating the most important item with a “1,” the second most important with a “2,” and the third most important with a “3.”

[Programmer Note: Only the selected sources of information in Section IV Question 2 will be displayed.]

- _____ Food service staffing needs
- _____ Food service staffing costs
- _____ Food service equipment and supply needs
- _____ Food service equipment and supply costs
- _____ Food service operations
- _____ Program management/administration needs
- _____ Child Nutrition Program participation rates
- _____ Menu items/variety
- _____ Local wellness policies and nutrition goals
- _____ Input from State Agency and/or State Distributing Agency
- _____ Input from other SFAs
- _____ Input from an advisory council
- _____ Input from the student body
- _____ Input from the community
- _____ Storage capacity
- _____ Regulatory meal pattern requirements
- _____ School board

4. Please indicate all staff involved in procurement planning for your Child Nutrition programs during SY 2017–2018 by selecting the corresponding box in the list below.

Select all that apply:

- SFA nutrition director
- SFA food service director or manager
- SFA head cook or kitchen/cafeteria manager
- Non-managerial food service staff
- District business office or purchasing department official
- District superintendent
- District school board
- State Agency Child Nutrition director or staff
- FSMC liaison
- Governing or advisory board
- Sales broker
- Group purchasing entity (cooperative, agent, or third-party service)
- Cooperative that only includes Child Nutrition Program operators
- Chief Financial Officer or SFA business office
- Other (Specify): _____

(Programmer Note: Skip to Question 7 if no response options were selected in Question 4.)

The following questions ask about your SFA's monitoring processes for contract evaluation and awards.

5. What oversight mechanisms (records, documentation, and mechanisms) does your SFA use to monitor staff as they make **procurement-related decisions**?

(Programmer Note: Do not allow respondent to select any other responses if "Our SFA does not monitor staff as they make procurement-related decisions" is selected.)

Select all that apply:

- FSMC monitoring forms
- Cost records
- Revenue records
- Invoice records
- Meal production records
- Meal count records
- Meal claim records
- RFP or IFB documentation
- Email communications
- Telephone communications
- Site visits
- Meetings
- Procurement plan
- Code of Conduct
- Other (Specify): _____
- Our SFA does not monitor staff as they make procurement-related decisions

6. What oversight mechanisms (records, documentation, and mechanisms) does your SFA use to monitor staff as they make **contract award decisions**?

(Programmer Note: Do not allow respondent to select any other responses if "Our SFA does not monitor staff as they make contract award decisions" is selected.)

Select all that apply:

- RFP or IFB evaluation criteria and results
- Meetings/negotiation phase, if applicable (RFP only)
- Procurement plan
- Code of Conduct
- Other (Specify): _____
- Our SFA does not monitor staff as they make contract award decisions

The following questions ask about your SFA's internal recordkeeping and accounting, and monitoring contractor performance.

7. What records or methods does your SFA use to track discounts, rebates, and credits for commercially purchased foods in cost-reimbursable contracts?

(Programmer Note: Do not allow respondent to select any other responses if "Don't Know/Unsure" is selected.)

Select all that apply:

- Electronic accounting system
 - Velocity reports (*a velocity report provides the SFA the quantity, the date of purchase, and other information about the purchase of food products from a vendor*) or current and historical sales information
 - Invoices for expenses
 - Profit and loss statements
 - Defined procedures in contract
 - Recordkeeping method of the broker or manufacturer

 - Other (Specify): _____
 - Don't Know/Unsure
8. What method does your SFA use to identify accounting errors when tracking discounts, rebates, and credits for commercially purchased foods and cost-reimbursable contracts?

(Programmer Note: Do not allow respondent to select any other responses if "Don't Know/Unsure" is selected.)

Select all that apply:

- Use an electronic accounting system
- Maintain receipt records in which the contractor identified costs
- Review bills and invoices that individually identify discounts, rebates, and applicable credits
- State Agency reviews the costs, discounts, rebates, and applicable credits maintained by the contractor
- Local education agency reviews the costs, discounts, rebates, and applicable credits maintained by the contractor
- Review profit and loss statements
- Review the methods contractors use to track discounts, rebates, and other applicable credits
- Monitor revenues and expenses based on the accounting method of the contractor
- Determine if the vendor is compliant with contractual disclosure method
- Other (Specify): _____
- Don't Know/Unsure

9. How does your SFA monitor contractor performance after award? An example of “contractor performance” would be monitoring to ensure that the contractor has provided all foods as required by the contract.

(Programmer Note: Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

Select all that apply:

- Identify people within the SFA responsible for receiving goods (specifically food) and services
- Examine goods (specifically food) or services, invoices, and documentation provided by contractor
- Request certification identifying the percent of U.S. content in supplied commercially procured foods
- Review applicable contractor certification records
- Review compliance reports
- Other (Specify) _____
- Don’t Know/Unsure

Section V. Procurement Guidance, Training, and Best Practices

This section contains questions about whether your SFA uses any guidance or templates when developing solicitations for procurement of goods (specifically food) and services, as well as your thoughts on their usefulness. By guidance, we are referring to assistance or information provided by any State or local government entity. This section also includes questions about any trainings your State Agency and local education agency provide related to procurement. We begin with questions about guidance.

1. Does your State Agency or local education agency **require** your SFA to use any of the following guidance for developing procurement contract solicitations?

Select all that apply:

(Programmer Note: Do not allow respondent to select response options 1, 2, or 3 if they select response option 4. Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

- Yes, FNS-provided guidance
- Yes, State Agency-provided guidance
- Yes, local education agency-provided guidance
- No, my State Agency and local education agency do **NOT** require my SFA to use any guidance for developing procurement contract solicitations
- Don’t Know/Unsure

2. Please check boxes in the table below to indicate which guidance **FNS or your State Agency has provided** to your SFA and which guidance has your SFA **explicitly used** for developing procurement solicitations.

Select all that apply:

(Programmer Note: Do not allow respondent to select any other responses in a column if “none” is selected in that column. Do not allow respondent to select any responses in the “Used by your SFA” column if “none” is selected in the “Provided by FNS or your State Agency” column.)

Type of Guidance for Developing Procurement Solicitations	Provided by FNS or your State Agency	Used by your SFA
Memos from FNS	<input type="checkbox"/>	<input type="checkbox"/>
Issue briefs from FNS	<input type="checkbox"/>	<input type="checkbox"/>
Manuals from FNS	<input type="checkbox"/>	<input type="checkbox"/>
Frequently Asked Questions (FAQs) from FNS	<input type="checkbox"/>	<input type="checkbox"/>
Institute of Child Nutrition online courses (e.g., “General Requirements and Responsibilities,” “How Procurement Works: Planning, Executing, and Administering a Competitive Procurement”)	<input type="checkbox"/>	<input type="checkbox"/>
Institute of Child Nutrition in-person trainings (e.g., “Procurement in the 21 st Century”)	<input type="checkbox"/>	<input type="checkbox"/>
USDA training (e.g., webinars, pamphlets, in-person training)	<input type="checkbox"/>	<input type="checkbox"/>
Memos from your State Agency	<input type="checkbox"/>	<input type="checkbox"/>
Frequently Asked Questions (FAQs) from your State Agency	<input type="checkbox"/>	<input type="checkbox"/>
State-sponsored training	<input type="checkbox"/>	<input type="checkbox"/>
One-on-one guidance	<input type="checkbox"/>	<input type="checkbox"/>
Weekly correspondence/communication	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify)	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>
Don't Know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>

3. Have any members of your SFA staff, including you, completed any of the following Institute of Child Nutrition online courses related to procurement contract solicitation?

Select all that apply:

(Programmer Note: Do not allow respondent to select any other responses if “none of our SFA staff members ...” is selected.)

- Financial Management: A Course for School Nutrition Directors
- Food Production Records
- Inventory Management and Tracking
- Quality in Value Added Products
- USDA Foods: Department of Defense (DoD) Fresh Fruit and Vegetable Program - The Basics
- USDA Foods: Life Cycle of USDA Foods
- USDA State Agency Guidance to Procurement Topic 1: General Requirements and Responsibilities
- USDA State Agency Guidance to Procurement Topic 2: How Procurement Works: Planning, Executing, and Administering a Competitive Procurement
- USDA State Agency Guidance to Procurement Topic 3: Special Considerations
- Procurement in the 21st Century
- Other (Specify) _____
- None of our SFA staff members have completed any Institute of Child Nutrition online courses related to procurement contract solicitation

4. Please check boxes in the table below to indicate which kind of guidance your **local education agency has provided** to your SFA and which kind of guidance your SFA has **explicitly used** for developing procurement solicitations.

Select all that apply:

(Programmer Note: Do not allow respondent to select any other responses in a column if “none” is selected in that column. Do not allow respondent to select any responses in the “Used by your SFA” column if “none” is selected in the “Provided by your local education agency” column.)

Type of Guidance for Developing Procurement Solicitations	Provided by your local education agency	Used by your SFA
Memos	<input type="checkbox"/>	<input type="checkbox"/>
Frequently Asked Questions (FAQs)	<input type="checkbox"/>	<input type="checkbox"/>
Issue briefs	<input type="checkbox"/>	<input type="checkbox"/>
Manual/handbooks	<input type="checkbox"/>	<input type="checkbox"/>
Local procurement requirements	<input type="checkbox"/>	<input type="checkbox"/>
Slide decks	<input type="checkbox"/>	<input type="checkbox"/>
Informational web pages	<input type="checkbox"/>	<input type="checkbox"/>
One-on-one guidance	<input type="checkbox"/>	<input type="checkbox"/>
Group training	<input type="checkbox"/>	<input type="checkbox"/>
Weekly correspondence/communication	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>
Don't Know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>

The next questions ask about FNS-, State Agency-, and local education agency-provided templates.

5. Does your State Agency or local education agency **require** your SFA to use any templates when developing procurement contract solicitations?

Select all that apply:

(Programmer Note: Do not allow respondent to select response options 1, 2, or 3 if they select response option 4. Do not allow respondent to select any other responses if “Don’t Know/Unsure” is selected.)

- Yes, FNS-provided templates
- Yes, State Agency-provided guidance
- Yes, local education agency-provided templates
- No, my State Agency and local education agency do not require my SFA to use templates for developing procurement contract solicitations.
- Don’t Know/Unsure

6. Please check boxes in the table below to indicate which templates **FNS, your State Agency, or your local education agency has provided** to your SFA and which templates has your SFA **explicitly used** to develop procurement solicitations.

Select all that apply:

(Programmer Note: Do not allow respondent to select any other responses in a column if “none” is selected in that column.)

Type of Template for Developing Procurement Solicitations	Provided by FNS	Provided by Your State Agency	Provided by Your Local Education Agency	Used by Your SFA
Solicitation templates for competitive sealed bids, IFBs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solicitation templates for competitive proposals, RFPs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Solicitation templates for small purchases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (Specify) _____ _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don’t Know/Unsure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Does your State Agency make training available to SFAs on procurement issues, including training provided by another party?

- Yes
- No (skip to Question 9)

8. What training topics does your State Agency make available to your SFA about procurement?

Select all that apply:

- Updates and changes to federal procurement policies and regulations
- Updates and changes to State procurement policies and regulations
- Products and specifications
- Solicitations
- Proposal/bid evaluations
- Food and supply orders
- Group purchasing efforts
- Forecasting
- Solicitations for contracts with FSMCs
- Farm to School activities and initiatives
- Procurement of local foods and geographic preference
- USDA Foods Processing
- Developing solicitations and contracts
- Services
- Code of Conduct
- Procedures for conducting procurement
- Allowable procurement methods to use
- Buy American
- Other (Specify): _____

Best practices help your SFA understand what works well for implementing particular aspects of procurement. They may be available in various forms, such as “how-to” instructions or recommendations, templates, or lessons learned, and may have been developed by your SFA or State Agency. Best practices are generally internal materials that supplement federal, State, and local procurement guidance and resources used to help your SFA comply with procurement regulations.

9. Does your SFA have best practices related to the following topics?

	Yes	No
Templates or standard contract language for contracts with FSMCs	<input type="checkbox"/>	<input type="checkbox"/>
Templates or standard contract language for contracts with processors (including, but not limited to, USDA Foods processors);	<input type="checkbox"/>	<input type="checkbox"/>
Templates or standard contract language for contracts with broadline distributors	<input type="checkbox"/>	<input type="checkbox"/>
Including the Buy American provision in <i>contract solicitations</i>	<input type="checkbox"/>	<input type="checkbox"/>
Including the Buy American provision in <i>contracts</i>	<input type="checkbox"/>	<input type="checkbox"/>
Maximum durations in procurement contracts	<input type="checkbox"/>	<input type="checkbox"/>
Publicly announcing/advertising IFBs	<input type="checkbox"/>	<input type="checkbox"/>
Publicly announcing/advertising RFPs	<input type="checkbox"/>	<input type="checkbox"/>
Direct solicitation from contractors for IFBs	<input type="checkbox"/>	<input type="checkbox"/>
Direct solicitation from contractors for RFPs	<input type="checkbox"/>	<input type="checkbox"/>
Small purchase procedures	<input type="checkbox"/>	<input type="checkbox"/>
Product specifications	<input type="checkbox"/>	<input type="checkbox"/>
Local bonding requirements (federal bonding requirements apply to construction and SFSP contracts only)	<input type="checkbox"/>	<input type="checkbox"/>
Procurement of local products	<input type="checkbox"/>	<input type="checkbox"/>
Managing procurement process timeframes	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>

SURVEY VERIFICATION SECTION

You are almost done! Before you click "Submit" please make sure you have completed all sections of the survey. You can click the section links below to navigate back into the survey. Once you click the "Submit" button you will not be able to edit your survey.

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