

***New Products***

***and Bid/Add-Ons Procedure***

* **Phase I – Introduction**

When new product is introduced via vendor meeting, food show, etc. the Committee meets to discuss viability. All steps require information to be added to online forms as part of the New Product Development (NPD).

Committee consists of:

* District Director
* Marketing Specialist
* Dietitian
* Purchasing Agent
* Production Specialist (Chef)
* Data Specialist

**Step**:

* 1. Committee meets to review item, with Vendor if possible. Initial check for cost, nutritive value, product quality, and possible interest.
* 2. Purchasing Agent or Production Specialist collects all *available* product information, including packaging, cost, storage needs, availability, and other bid requirements. This is input to [online form NPD1](http://bit.ly/NPDev1) to begin the approval procedure.
	+ If an item requires testing, or is new to the district, the Production Specialist begins.
	+ If an item is a replacement, or requires only a new websmartt item ID (no testing), the Purchasing Agent begins.
* **Phase II – Assessment**
* 3. Dietitian examines nutritional information specific to product application. Pre-packaged items skip to step 5.
* 4. Production Specialist begins developing recipes & usage ideas, if necessary (non-prepack items).
* 5. Request samples of product for testing. & determine usage applications: reimbursable, a la carte, snack, special menu, vending. Testing approach depends on product (pre-packaged, ingredient, or snack) and implementation site (elementary or secondary determines forms used)
* 6. Purchasing Agent requests for product to be sent to the Sivia test kitchen.
* 7. Production or Marketing Specialist determine testing need & preparations. Items without a need to test skip to step 13 in Phase 4.
* **Phase III – Testing**
* 8. Marketing Specialist works with chosen school sites’ administration, cafeteria staff, and Production Specialist to decide best testing dates & times. Tests occur within three weeks of warehouse receiving samples. Focus groups consist of approximately a dozen students instructed to fill out [detailed, written feedback forms](https://docs.google.com/a/gm.sbac.edu/file/d/0Bx3wpbnckO7rT2Zac1ZiYW5RNms/edit) at three sites.
* 9. Production Specialist prepares product according to recipe and/or design. (BOH test)
* 10. Marketing Specialist distributes & collects survey information from students & faculty using Alachua District [survey sheets](https://docs.google.com/a/gm.sbac.edu/file/d/0Bx3wpbnckO7rT2Zac1ZiYW5RNms/edit). (FOH test)
* 11. Production Specialist collects qualitative information from manager and staff, revises recipe or preparation of product and prepares a final version in standard format.
* 12. Results are calculated by Marketing Specialist and reported to Committee. A final student-approval average of **3.5+** rating among the best 3 scores from a suggested minimum of 3 sites is required for further movement of the product. A score of >=4 after two sites will not require further testing. A score of <=2.5 ends further testing and the product is not approved.
* **Phase IV - Confirmation**
* 13. Committee reviews results, notes, and final recipe.
* 14. Purchasing Agent & Director share our product application with vendor and other districts. Encourage vendors to test with other districts to help increase delivery & supply volume.
* 15. Committee meets to review final product for approval.
* 16. Determine if product can be regularly stocked or shipped to distributor (instock, special order, direct delivery, etc.)
* **Phase V – Implementation**
* 17. Purchasing Agent secures real cost, submits New Item Request to Distributor
* 18. Marketing Specialist develops applicable co-op cart options, special menu promotion or marketing: signage, food lists, and other support materials.
* 19. Purchasing Agent authorizes product to be added to menu(s) no less than three weeks in advance of utilization. (The final “GO”)
* 20. Purchasing Agent & Data Specialist add item to Purchasing Guide(s) and Winsnap using the [NPD aggregated online forms](https://docs.google.com/a/gm.sbac.edu/spreadsheet/ccc?key=0Ah3wpbnckO7rdE9DaUFXSEdIS214ellhRzdJbTROOXc&usp=drive_web#gid=2) as a resource. If for special menu, open in Winsnap for order period only. Email final product information to Buying Group.
* 21. Production Specialist determines need for POS keys to be added to Winsnap.
* 22. Marketing Specialist presents New Item Summary to Managers, either by email or at monthly meeting. Presentation should include information from the [Product Development Sheet](https://docs.google.com/a/gm.sbac.edu/spreadsheet/ccc?key=0Ah3wpbnckO7rdE9DaUFXSEdIS214ellhRzdJbTROOXc&usp=drive_web#gid=2).
* Name
* Recipe
* Photo (and/or sample)
* winsnap number
* POS key number
* selling price
* Application (component, alacarte, vend)
* 23. Supervisors follow up with managers to assess understanding, usage, and feedback. Production Specialist provides extra training or preparation info as necessary.
* 24. Purchasing Agent follows up with usage & velocity reports to assess ideal utilization and any need for further building of usage.

# New Products and Bid/Add-Ons Procedure

(CliffNotes Version)

All stages dated & signed on tracking spreadsheet: <http://bit.ly/wag0Da>

Committee: Director, Marketing Specialist, Dietitian, Purchasing Agent, Production Specialist

**Phase I – Introduction**

1. **Committee** looks at cost, nutrition, & quality. Decide reimbursable, a la carte, snack, special menu, or vending. Pre-packaged items move straight to stage 3.

2. **Purchasing Agent** collects product info, as well as current warehouse space.

 **Phase II – Assessment**

3. **Dietitian** examines nutritionals Pre-packaged items skip to stage 5.

4. **Production Specialist** develops recipe ideas.

5. **Purchasing Agent** requests samples.

6. **Purchasing Agent** sends these to the warehouse.

7. **Production Specialist** or **Manager** determine testing. If no, skip to 13.

**Phase III – Testing**

8. **Marketing Specialist** and **Production Specialist** decide testing dates within 3 weeks.

9. **Production Specialist** cooks recipe, designs layout, presentation.

10. **Marketing Specialist** handles survey info.

11. **Production Specialist** does informal staff survey

12. **Marketing Specialist** reports results to Committee.

 **Phase IV - Confirmation**

13. **Committee** reviews results.

14. **Purchasing Agent** shares usage, results with vendor and other districts.

15. **Committee** meets for product approval.

16. **Purchasing Agent** checks for stocking & shipping info.

**Phase V – Implementation**

17. **Purchasing Agent** secures real cost.

18. **Marketing Specialist** develops co-op, promotions.

19. **Purchasing Agent** approves item for menu cycle(s).

20. **Purchasing Agent/Data Specialist** adds to Purchasing Guide and Winsnap.

21. **Production Specialist** gauges need for POS keys.

22. **Marketing Specialist** presents to **Managers**, by email or monthly meeting.

23. **Supervisors** follow up with. **Production Specialist** provides extra training or prep.

24. **Purchasing Agent** calculates velocity reports, determines usages to secure long-term stock.