



**PURCHASE SMAART**  
CULINARY AND HOSPITALITY GROUP PURCHASING

# **NEW PRODUCT PROCESS**

**January 2024**



# New Product Timeline

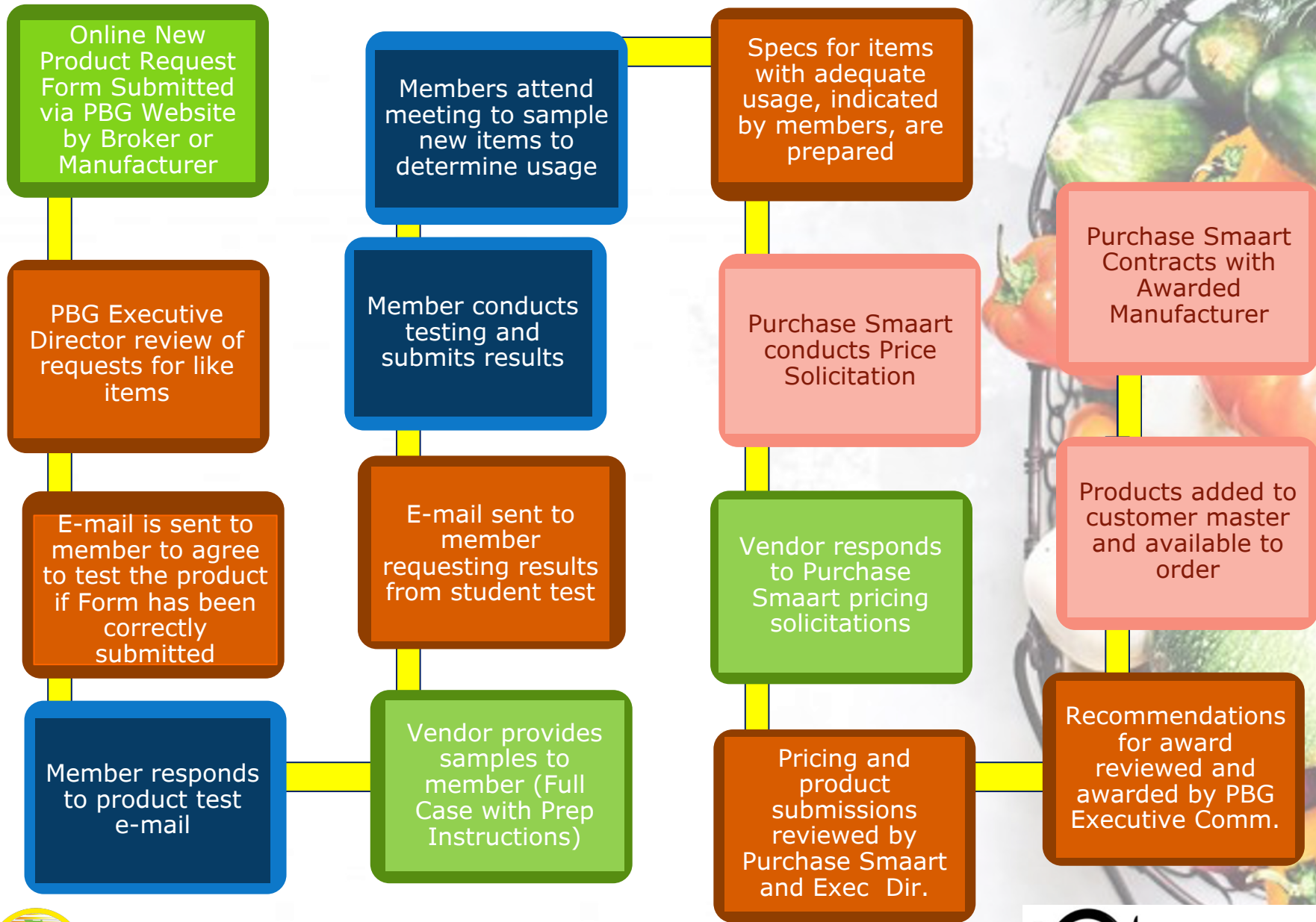
Business Partners Responsibilities				New Product Request Timeline	Dates / Deadlines	
Brokers/ Manufacturers	PBG Members	Executive Committee/ Purchase Smaart	Purchase Smaart/Sysco	Steps in the Process	On-Going	New Item Solicitation Timeline
✓	✓			New Product Request Form (available on PBG website) submitted with ALL Required Attachments (Broker/Manufacturer and district should review Customer Master for like product prior to submission)	Throughout year	
		✓		PBG email sent to member to agree to student test the product	Throughout year	
	✓			Member responds to PBG email YES or NO to student test the product	Throughout year	
✓				Vendor provides samples to member for student testing	Throughout year	
		✓		Email sent to member to request test results	Throughout year	
	✓			<b>Member must:</b> 1. Conduct student testing AND 2. Submit test results via online form	Throughout year	

# New Product Timeline, cont.

Business Partners Responsibilities				New Product Request Timeline	Dates / Deadlines	
Brokers/ Manufacturers	PBG Members	Executive Committee/ Purchase Smaart	Purchase Smaart/Sysco	Steps in the Process	On-Going	New Item Solicitation Timeline
		✓		PBG Executive Committee decide on approved requests to be reviewed at Division Meetings (Deadlines for new items October 31st )		November
	✓			PBG Members attend Member Meetings to review new items and provide usage to Exe. Director		December
		✓		PBG Executive Committee determine items for price solicitation based on District/Divison usage (This process will also be done throughout the year for very unique items)		December
		✓		Specifications prepared for approved products by Ex. Dir.		December
		✓	✓	Purchase Smaart processes pricing solicitations		December
✓				Vendor responds to the Purchase Smaart product pricing solicitation		December

# New Product Timeline, cont.

Business Partners Responsibilities				New Product Request Timeline	Dates / Deadlines	
Brokers/ Manufacturers	PBG Members	Executive Committee/ Purchase Smaart	Purchase Smaart/Sysco	Steps in the Process	On-Going	New Item Solicitation Timeline
		✓	✓	Pricing and product submissions reviewed by Purchase Smart and Ex. Dir.		January
		✓	✓	Recommendations for award presented for review, discussed, adjusted as appropriate and AWARDED by the Executive Board		January
			✓	Purchase Smaart contracts with awarded vendor		January
		✓		Exe. Director will update product information on website		January
		✓	✓	Purchase Smaart will prepare FAR for newly awarded items with pricing. Executive Director will forward forecast sheets to member districts and instruct them to return the completed sheets to Purchase Smaart to be shared with Sysco		January
			✓	<b>Products are added to the Customer Master and Sysco will update district's order guides as appropriate.</b>		January

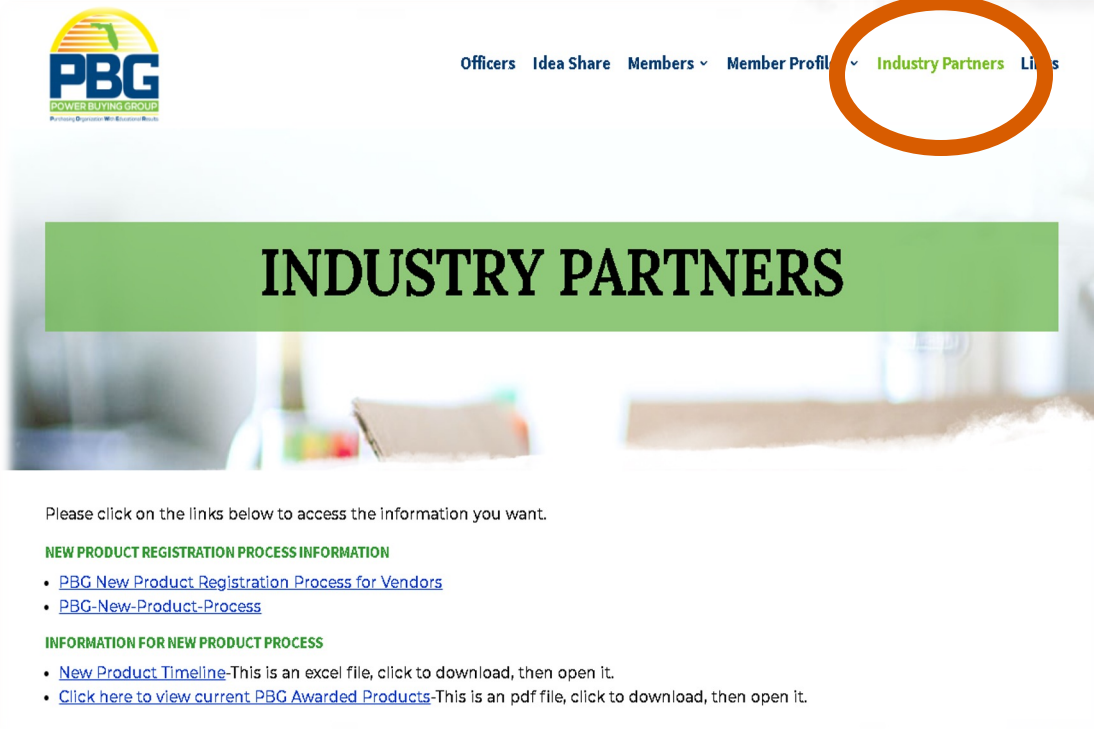


Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**Search: POWER Buying Group**

**[www.thepowerbuyinggroup.com](http://www.thepowerbuyinggroup.com)**

**Open: INDUSTRY PARTNERS  
tab**



**PBG**  
POWER BUYING GROUP  
Purchasing Organization With Educational Results

Officers Idea Share Members Member Profile **Industry Partners** Links

## INDUSTRY PARTNERS

Please click on the links below to access the information you want.

**NEW PRODUCT REGISTRATION PROCESS INFORMATION**

- [PBG New Product Registration Process for Vendors](#)
- [PBG-New-Product-Process](#)

**INFORMATION FOR NEW PRODUCT PROCESS**

- [New Product Timeline](#)-This is an excel file, click to download, then open it.
- [Click here to view current PBG Awarded Products](#)-This is an pdf file, click to download, then open it.



Online New Item Request Form Submitted Via PBG Website By Broker Or Manufacturer

Click on link to view instructions



Officers Idea Share Members Member Industry Partners Links

## INDUSTRY PARTNER

Please click on the links below to access the information you want.

### NEW PRODUCT REGISTRATION PROCESS INFORMATION

- [PBG New Product Registration Process for Vendors](#)

## PBG New Product Registration Process for Vendors

THE P.O.W.E.R. BUYING GROUP  
(PURCHASING ORGANIZATION WITH EDUCATIONAL RESULTS)




LINK to the Form is included in Step 1 of the instructions below

Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

The FIRST step in  
the instructions  
includes the LINK  
to the form

**NOTE:**  
read all  
instructions  
prior to  
submitting  
the form to  
ensure all  
required  
information  
is included.

<p>1 To initiate a new product review, the vendor will enter this link in your browser or click the link.</p> <p><a href="https://forms.gle/Wn61UvBtG22UXCXB9">https://forms.gle/Wn61UvBtG22UXCXB9</a></p>	
<p>2 Complete all required fields on the form.</p> <ul style="list-style-type: none"><li>• The email address provided will be used for all contact on the part of this product</li><li>• Be certain the member district has <b>ALREADY</b> agreed to test the product. Members will receive email from PBG and are required to confirm interest in the product</li><li>• Pricing is "ballpark" and will not be used as the submitted price for a PBG</li></ul>	

**Click on the  
link to access  
the form.**





Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**Complete  
all fields**

1. PRODUCT NAME/DESCRIPTION \*

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2. PRODUCT MANUFACTURER ID NUMBER \*

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3. MANUFACTURER/BRAND \*

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4. VENDOR COMPANY/BROKERAGE NAME \*

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5. VENDOR CONTACT NAME \*

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Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**Complete  
all fields**

**NOTE:**  
Please make sure  
you have a  
district that  
agrees to test  
product before  
completing form.

6. VENDOR EMAIL ADDRESS \*

\_\_\_\_\_

7. VENDOR PHONE NUMBER \*

\_\_\_\_\_

8. TESTING DISTRICT \*

*Mark only one oval.*

- BAKER COUNTY
- CALHOUN COUNTY
- CHARLOTTE COUNTY
- COLLIER COUNTY
- DESOTO COUNTY
- GADSDEN COUNTY
- GLADES COUNTY
- HARDEE COUNTY
- HIGHLANDS COUNTY
- LEVY COUNTY
- LIBERTY COUNTY
- MARION COUNTY
- MARTIN COUNTY
- OKEECHOBEE COUNTY
- OSCEOLA COUNTY
- ST. LUCIE COUNTY
- TRUE NORTH CHARTERS
- VOLUSIA COUNTY
- WALTON COUNTY



Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**Complete  
all fields**

9. MANUFACTURER DELIVERY MINIMUMS (E.G. 1 PALLET) \*

\_\_\_\_\_

10. MANUFACTURER APPROXIMATE LEAD, TIME AFTER DISTRIBUTOR HAS PLACED \*  
ORDER, FOR DELIVERY

\_\_\_\_\_

11. SYSCO NUMBER (if applicable)

\_\_\_\_\_

12. APPROXIMATE COST PER SERVING \*

\_\_\_\_\_

13. NUMBER OF SERVINGS PER CASE \*

\_\_\_\_\_

14. IS THIS PRODUCT USDA PROCESSABLE \*

*Mark only one oval.*

YES

NO

15. IS THIS PRODUCT SMART SNACK COMPLIANT (if applicable)

*Mark only one oval.*

YES

NO



Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

## Complete all fields

**Please name your  
single PDF with the  
Manufacturer ID  
Number followed by  
the name of the  
product, then the  
Brand Name.**

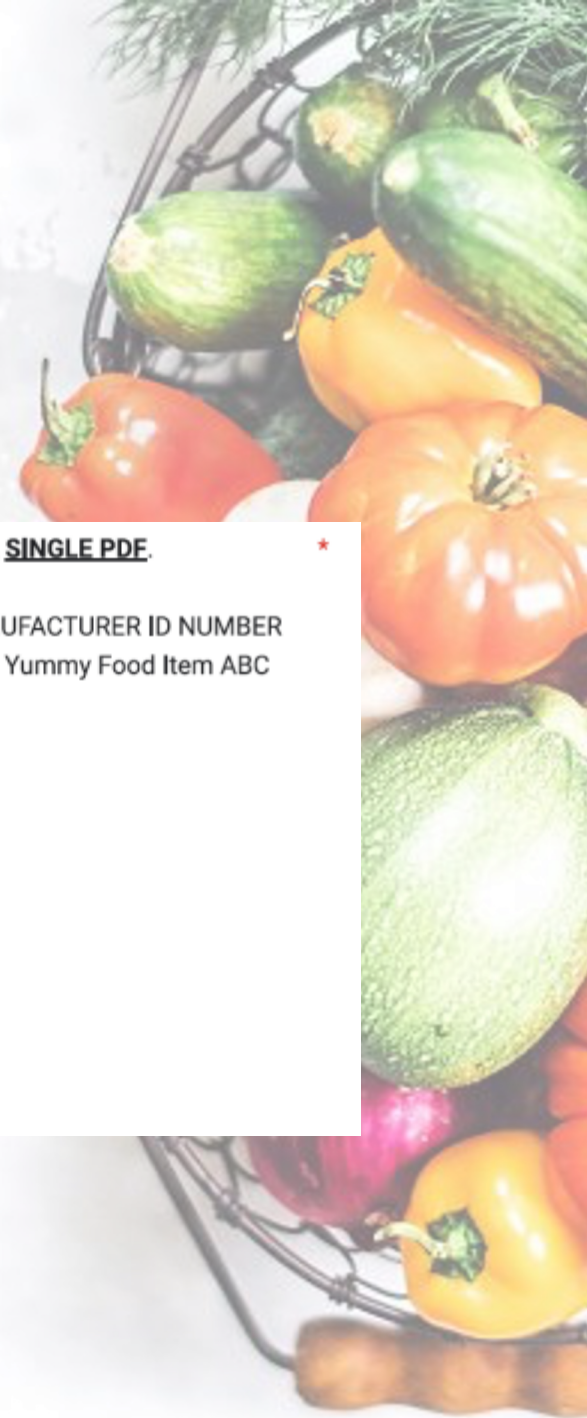
16. PLEASE ATTACH ALL REQUESTED INFORMATION IN A SINGLE PDF. \*

THE PDF NAME MUST INCLUDE THE PRODUCT'S MANUFACTURER ID NUMBER  
AND THE NAME OF THE PRODUCT. EXAMPLE: 112233 Yummy Food Item ABC  
BRAND

**INCLUDE THE FOLLOWING IN THE SINGLE PDF:**

PICTURE OF PRODUCT  
CN LABEL (if applicable)  
PRODUCT FORMULATION STATEMENT (if applicable)  
NUTRITION LABEL  
ALLERGEN INFORMATION

Files submitted:



Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**New Product Requests that do not contain the below minimum information will be rejected.**

ATTACH ALL PRODUCT INFORMATION IN A SINGLE PDF FILE - THE FILE NAME WILL BE THE MANUFACTURER ID#, THE NAME OF THE PRODUCT AND THEN THE BRAND NAME.

**Ensure all required information is included in the attached file.**

**The ONE file must include the Product ID# the name of the product and the Brand Name, in the **.pdf** file name.**



Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

Click the **SUBMIT**  
**button** to upload the  
form.

This complete  
process is required  
for each  
**INDIVIDUAL**  
product to be  
student tested.

**DO NOT UP LOAD**  
**MULTIPLE PRODUCTS**  
**IN THE SAME REQUEST**



Online New Item  
Request Form  
Submitted via PBG  
Website by Broker or  
Manufacturer

**Each submission is automatically emailed to the Executive Director and the New Product Chair to determine if the submission is complete and to check for similar items currently awarded.**



Online New Item  
Request Form  
Submitted Via PBG  
Website By Broker  
Or Manufacturer

**Vendors will receive an email confirming if submission is or is not complete and acceptable.**

**Incomplete submissions may be resubmitted.**





E-mail Is Sent To  
Member To Agree  
To Test The Product  
If Form Has Been  
Correctly Submitted

**Member district  
selected on form  
receives an email  
requesting confirmation  
they agree to test the  
product.**



## Member Responds To Product Test E-mail

**Member districts are required to respond to the email with either a “YES” or a “NO” answer (within 3 business days).**



Vendor Provides  
Samples To Member  
(Full Case With Prep  
Instructions)

- **The vendor will contact the testing district to arrange for product delivery location for student testing.**
- **PBG requires that the testing district will receive at least one production case for student testing.**



E-mail Sent To Member  
Requesting Results  
From Student Test

**Testing district  
receives email with  
link to the form to  
submit the student  
test results.**



Member Conducts  
Testing And  
Submits Results

- **Member districts are to test the product within 30 days or prior to the new product deadline.**
- **Products not tested before the deadline may remain active and can be reviewed during the next new item period**



Member Conducts  
Testing And  
Submits Results

**Member enters  
student test results  
and comments are  
required on all  
student testing forms.**



Member Conducts  
Testing And  
Submits Results

**The Executive Director  
and New Product Chair  
confirm if food product  
test results are at least  
**80%** for Executive  
Committee  
consideration**



**PBG Executive  
Committee  
Review Of  
Requests For  
Like Items**

**The Executive Committee will review all completed vendor submissions, taking into consideration:**

- **Student testing results.**
- **The uniqueness of the product.**
- **Current items on bid.**
- **Smart Snack compliance.**
- **Projected portion cost.**

**Products approved will be scheduled for member review at a member meeting.**





Member Conducts  
Testing And  
Submits Results

**Vendor will receive an email to show the new product at a PBG Member meeting if the approved by the PBG Executive Committee.**



Specs For Items  
With Adequate  
Usage, Indicated  
By Members, Are  
Prepared

- **The Executive Director prepares specifications for a price solicitation by Purchase Smart for new items determined to have adequate projected usage.**
- **Purchase Smart requests an addition to the contract for products determined to be “additional flavors” of currently awarded items.**
  - Criteria are:**
    - ✓ **flavor different from awarded product(s)**
    - ✓ **SAME nutrition and meal component crediting as awarded product**
    - ✓ **SAME portion price as awarded product**



Purchase Smaart conducts  
Price Solicitation

- **Purchase Smaart distributes the price solicitation to all interested vendors.**
- **Vendors are to contact Purchase Smaart to be included on the price solicitation distribution.**

**[Scott.Euton@purchasesmaart.com](mailto:Scott.Euton@purchasesmaart.com)**



Vendor Responds  
To Purchase  
Smart Pricing  
Solicitations

**Vendors must respond with all requested pricing and documentation including complete specifications and the Buy American form by solicitation deadline.**



Purchase Smart conducts Price  
Solicitation

**Each product is reviewed to determine the lowest-price, responsive item meeting the specification criteria and in the best interest of the POWER Buying Group.**



Recommendations  
For Award Reviewed  
And Awarded By PBG  
Executive Committee

**Recommendations for  
award are presented to the  
PBG Executive Committee  
which votes on final  
approval of all products  
reviewed.**



Purchase Smart  
Contracts With  
Awarded  
Manufacturer

**Purchase Smart contracts  
all awarded companies and  
works with vendors to  
finalize contract details.**



Products Added To  
Customer Master  
And Available To  
Order

**An updated Customer Master list of all products available for PBG members to purchase from Sysco is then emailed to all members and published on the PBG website.**

<http://thepowerbuyinggroup.com>





## Products Added To Customer Master And Available To Order

- **Members submit FAR (Forecasting Forms) of the specific products and their planned usage for the newly awarded items, adding these products to their Sysco Order Guide.**
- **Sysco orders products to be available for delivery to the members.**



# Questions?

For follow-up contact the  
PBG Executive Director, at  
[powerbuyinggroup@gmail.c](mailto:powerbuyinggroup@gmail.com)  
[om](mailto:powerbuyinggroup@gmail.com)



# Thank you!

