

Private Institution Request for Proposal Incorporating Values-Based Procurement Template

This template outlines how values-based procurement may be incorporated into a private institution's food operations RFP.

1) **Signal** Institutional Commitment to Values-Based Procurement

Institutional Commitment to Values-Based Procurement

A commitment to increasing purchases of *[insert values identified in food purchasing guidelines]* food is a component of *[Institution's strategic plan or its other commitments, vision, or identity]*. *[Institution]* supports a population of *[approximately X]* on a food purchasing budget of *[approximately X]*. Through its food purchasing, *[Institution]* seeks to develop relationships with *[insert short description of vendor preferences if relevant]*.

2) **State** Expectations for a Management Company's Implementation of Values-Based Purchasing

General Values-Based Procurement Expectations

The selected management company must seek to comply with *[Institution's Food Purchasing Guidelines]*, track and provide purchasing data and information, and utilize practices and processes to support *[Institution's]* desired purchasing goals. *[Institution's Food Purchasing Guidelines]* are available in *[Appendix X]*.

Tracking, Data Collection, & Reporting Expectations

The management company will be expected to track the products purchased from values-based vendors by spend and percentage of total spend for the tracking period. Values-based vendors are vendors that meet standards set forth in *[Institution's Food Purchasing Guidelines]*.

The management company will also be expected to track the following metrics:

- *[List specific standards from the Institution's Food Purchasing Guidelines.]*

Data pertaining to metrics identified by *[Institution]* will be included in *[insert tracking period]* reports of values-based food purchases provided by the management company to *[Institution]*. The management company will provide reports digitally in *[insert institution's preferred data organization software]*.

Volume Rebate Disclosure Expectations

[Institution] is committed to expanding its food purchasing with vendors that align with *[Institution's Food Purchasing Guidelines]*. To advance this commitment, *[Institution]* seeks transparency in its food purchasing, including relevant information about volume discount rebates, incentives, and credits from vendors. *[Institution]* seeks a management company that shares this commitment.

Vendor Relationship Expectations

The management company is expected to regularly communicate with vendors that meet *[Institution's Food Purchasing Guidelines]* about the management company's vendor certification process and purchasing.

For values-based vendors pursuing vendor certification, management company is expected to provide information about the requirements to complete certification and remain in contact with these vendors throughout the process. For certified values-based vendors, management company is expected to establish a communication schedule to discuss product needs, purchasing amounts, frequency, and pricing.

Existing Values-Based Practices & Processes Expectations

[*Institution*] is committed to [*insert total values-based purchasing goal*]. [*Institution's Food Purchasing Guidelines*] detail the institution's requirements and preferences in purchasing to achieve its goal. [*Institution*] seeks a management company with experience and proficiency in values-based procurement. [*Institution*] also seeks a management company that also demonstrates a commitment to values in its company practices and policies.

3) *Solicit Relevant Management Company Information about its Capacity to Deliver*

Tracking & Data Collection

- How does the management company track and maintain purchase data (including spend and weight)?
- How and at what frequency does the management company currently convey purchase data to its clients? Please provide examples of reports conveying purchase data.
- Can the management company collect data about location, demographic, growing practices, and certifications of vendors? If such data is available, will the management company share it with the institution?
- What other data is collected by the management company about vendors? Will the management company share that data with the institution?
- How and at what frequency can the management company convey data about vendors to its clients? Please provide examples of reports conveying vendor data.
- Does the management company have experience with producing sharable content based on purchase data (e.g., data visualizations, social media content, vendor profiles or testimonies)?

Volume Rebate Transparency Practices

- What level of transparency can the management company provide regarding volume rebates, discounts, and credits from vendors when purchasing for [*Institution*]?
- How does the management company collect and record information on volume rebates and discounts received from suppliers?
- How does the management company communicate with institutions about volume rebates and discounts?
- Can the management company share its volume rebates with institutions? Has it done so in the past?

Vendor Eligibility & Relationship Management Practices

- Does the management company have a certification process for local producers to become vendors? If so, what are the requirements in the process and estimated timeframe? How does the management company define "local"?
- Does the management company have a certification process for sustainable producers to become vendors? If so, what are the requirements in the process and estimated timeframe? How does the management company define "sustainable"?

- Does the management company have a certification process for diverse or minority producers to become vendors? If so, what are the requirements in the process and estimated timeframe?
- Does the management company have a certification process for small- and/or mid-size producers to become vendors? If so, what are the requirements in the process and estimated timeframe?
- How does the management company find new vendors?
- How does the management company communicate with vendors about selling to new institutions?

Existing Values-Based Practices & Processes

- How many vendors currently certified by the management company meet the requirements and preferences set forth in [*Institution's Food Purchasing Guidelines*]?
- Has the management company worked with other institutions implementing values-based procurement or similar purchasing goals?
- How has the management company promoted local economic investment by engaging in local and regional food procurement?
- Does the management company have strategies to promote ethical sourcing?
- How does the management company cultivate relationships with vendors in the community?
- How does the management company incorporate transparency and accountability in its food procurement efforts?
- Does the management company have a statement of values? If so, what are they and how do operations reflect these values?

(This question can be modified to ask about a specific value, including climate and sustainability, CSR/ESG, worker's rights and welfare, DEI, etc.)

4) **Set Forth** Values-Based Procurement in Evaluation Metrics

Evaluation Criteria

RFP submissions will be evaluated by the [*Institution RFP Review/Selection Committee*] based on the established Evaluation Criteria detailed below:

[List of food operations RFP evaluation criteria (e.g., cost, business practices, experience, staffing, references) and allocated points or percentage]

Values-Based Procurement: The management company's demonstrated desire and ability to deliver a program that is consistent with [*Institution's Food Purchasing Guidelines*] and advance [*Institution's*] goals related to values-based procurement. The management company's demonstrated ability to track and report program adherence to [*Institution's Food Purchasing Guidelines*] and progress toward [*Institution's*] goals.

[If allocating points or percentages to criteria, list the allocation for the values-based procurement.]