

# Secure Funding Worksheet

*Institutions may use the following worksheet to evaluate the current food operations budget and explore supplemental funding streams.*

## Worksheet: Securing Funding for Values-Based Food Procurement

### I. Evaluate the Current Food Operations Budget

#### Food Operations Budget Process

- When is the food operations budget set?
- What is the timeline for budget proposal, review, and approval?
- What primary spending areas are included in the food operations budget (e.g., staff, training, facilities, equipment, food service management company contracting, food purchasing, supplies purchasing)?
- What kind of information is included in the food operations budget proposal?
- What has the food operations budget been each of the last 3-5 years?
- Are there any external funds (funds from outside the institution) incorporated into the food operations budget?

#### Food Operations Budget Stakeholders

- What departments from the institution are involved in setting the food operations budget? Who are the key individuals involved from each department?
- Who makes the final decision about the food operations budget?
- Who is responsible for tracking spending and providing accounting and reports?
- Who is authorized to make food purchasing decisions and at what amount?
- Who is authorized to make food operations staffing decisions?
- Who is authorized to make training and professional development decisions?
- Who is authorized to make food operations facilities and equipment decisions?

#### Food Operations Budget Details

- Locations*
  - How many food service locations are at the institution?
  - Do all locations follow the same schedule for food purchasing or do they vary?
  - What is the budget allotment for each location?
- Purchasing*
  - How do purchasing budgets break down into increments over a year? Do purchasers have a weekly or monthly budget?
  - What amount of the budget is allocated to food purchasing?
  - Are there currently purchasing requirements or priorities governing the institution's food procurement?
  - Are any purchasing funds allocated for specific types of products?
  - What products are purchased regularly? What are the price points for these products?

- Staffing*
  - What amount of the budget is allocated to staffing and personnel?
- Training and Professional Development*
  - What amount of the budget is allocated to trainings and professional development?
- Facilities and Equipment*
  - What amount of the budget is allocated to facilities updates or renovations? What amount is allocated to equipment updates?
  - Is there a schedule or process for facilities and equipment reviews and updates?

## II. Research Supplemental Funding Streams for Values-Based Procurement

### Supplemental Internal Funding Streams

1. Review offices, departments, teams, and personnel at the institution to identify shared values and goals with the values-based food procurement program. Areas of focus include:
  - Climate & Sustainability
  - Community Engagement & Development
  - Diversity, Equity, and Inclusion
  - Employee/Student Well-Being
  - Environmental, Social, and Governance & Corporate Social Responsibility
  - Facilities
  - Innovation
  - Professional Development
  - Resiliency
  - Other (e.g., research, education, data and technology, recruitment/retention, public relations)
  
2. For relevant focus areas, complete the table below to prepare for outreach and engagement about supporting values-based food procurement:

Area of Focus	Office, Department, Team, and/or Personnel	Shared Values & Goals with Values-Based Procurement & Source
<i>Ex: Climate &amp; Sustainability</i>	<i>Office of Sustainability, Director of Sustainability</i>	<input type="checkbox"/> <i>Reduction of carbon emissions (Climate Action Plan, p. 12)</i>

3. Keep the following tips in mind:
  - Review available information and reporting from the office or personnel. Make note of values and/or goals that align with values-based food procurement.

- Be prepared to communicate how a values-based food purchasing program can contribute to the goals or mandates of the office/personnel.
- Ask about how the office/personnel tracks its progress and what kind of data it needs for demonstration of impact. Invite the office/personnel to share short-term, mid-term, and long-term goals.
- Ask about whether contributing funds to values-based purchasing is an option or could be in the future.
- Offer to keep the office/personnel apprised of the values-based procurement program's development, progress, and reporting. Consider inviting the office/personnel to take part in program development if there is interest and relevance.

**Supplemental External Funding Streams**

1. Research public (government) and private external funding opportunities. For potential funding sources, consider using the following breakdown to capture key details.

**Funding Source:** *[Insert source]*

**Application Deadline:** *[Insert deadline]*

**Eligibility, Requirements, Preferences:**

- [List eligibility and requirements]*

**Potential Application to Values-Based Procurement Program:**

- [List potential applications to institutional VBP program]*

**Link to Funder/Application:** *[Insert link(s) for more information]*

*Example:*

**Funding Source:** USDA National School Lunch Program Equipment Assistance Grant passed through Georgia Department of Education

**Application Deadline:** October 15, 2024

**Eligibility, Requirements, Preferences:**

- School food authority participating in the National School Lunch Program
- Eligible equipment will:
  - Improve the quality of school nutrition meals;
  - Improve food safety in school meal programs; or
  - Improve/expand participation in school meals
- One piece of equipment with a value greater than \$1000
- Preference for applicants that have not received the grant before

## **Potential Application to Values-Based Procurement Program**

- Walk-in freezer for whole foods storage
- Milk cooler
- Dishwashing equipment

### **Link to Funder/Application:**

- Georgia Department of Education Grant Opportunities:  
<https://plo.gadoe.org/Pages/Grant-Opportunities.aspx>
- FY 2024 Equipment Grant – Georgia Plan:  
<https://lor2.gadoe.org/gadoe/file/5f483f15-68d6-48cf-aa6d-256282508d6f/1/EquipmentAssistanceGrantApplication.pdf>
- USDA Food & Nutrition Service Equipment Assistance Grant:  
<https://www.fns.usda.gov/nsfp/equipment-assistance-grants>