

## **Standard Operating Procedures for Managing Values-Based Procurement: [Management Company] & [Values-Based Vendor] Templates**

*This template includes model recommendations for SOPs between a management company and both prospective and approved values-based vendors.*

[Insert Date]

### **Standard Operating Procedures for Managing Values-Based Procurement: [Management Company] & [Prospective Values-Based Vendor]**

1. [Management Company] and [Values-Based Vendor] will designate a primary contact to manage communication and vendor certification processes:

[Management Company Designated Contact]: [email]; [phone number]

[Values-Based Vendor Designated Contact]: [email]; [phone number]

2. [Management Company Designated Contact] will provide prospective values-based vendors with orientation materials that give an overview of the purchasing program, outline vendor certification and food safety requirements, list desired products, and detail delivery logistics.

3. Values-based vendors will be encouraged to share orientation materials that give an overview of the vendor, list projected products, and detail delivery practices.

4. After sharing materials, [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] will have a follow-up conversation focusing on any areas of interest, questions, or concerns (e.g., vendor certification requirements; production; delivery logistics). [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] will also discuss projected product price points and desired quantities to assess whether the purchasing relationship could be feasible and beneficial for both parties. [Management Company Designated Contact] should keep in mind that values-based vendors are priorities for [Institution] and procurement from these vendors advances important institutional goals stated in [insert reference to supporting documents (e.g., Institution's food purchasing guidelines; Institution's VBP announcement; Management Company's food service contract)]

5. If the [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] want to proceed, [Management Company Designated Contact] will provide guidance and assistance in navigating the vendor certification process.

[Insert Date]

**Standard Operating Procedures for Managing Values-Based Procurement: [Management Company] & [Approved Values-Based Vendor]**

1. [Management Company] and [Values-Based Vendor] will designate a primary contact to manage communication and food purchasing transactions and logistics:

[Management Company Designated Contact]: [email]; [phone number]

[Values-Based Vendor Designated Contact]: [email]; [phone number]

2. [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] will discuss desired products, price points, quantities, and frequency. Based on these conversations, [Management Company Designated Contact] will introduce the available purchasing commitment options: [insert the available commitments: individual purchasing commitment; standing purchasing commitment; forward purchasing commitment].

3. Based on the agreed upon purchasing commitment, [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] will establish a schedule for communication, purchasing, deliveries, and payment. [Management Company Designated Contact] will also explain any flexibility [Management Company] has to adjust schedules to accommodate vendor needs.

4. [Management Company Designated Contact] will provide details for deliveries including location, directions, and any special instructions. If there is a different or additional point of contact for site deliveries, [Management Company Designated Contact] will provide that information to [Values-Based Vendor Designated Contact].

5. [Management Company Designated Contact] will encourage [Values-Based Vendor Designated Contact] to record pictures of ordered product when it leaves the vendor site and when it is delivered to the delivery location.

6. If there is a concern or problem with delivered product, [Management Company Designated Contact] will arrange for a picture to be taken. [Management Company Designated Contact] will reach out to [Values-Based Vendor Designated Contact] to discuss any concerns, questions, and plans for future deliveries.

7. Every [insert time interval], [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] review completed purchasing commitments to assess the purchasing relationship, address any challenges or concerns, and discuss whether there should be expansion or adjustment in purchasing.

8. [Management Company Designated Contact] and [Values-Based Vendor Designated Contact] should conduct regular check-ins, either through site visits or phone calls, to ensure ongoing alignment and address emerging needs, opportunities for improvement, or opportunities for growth.