

APPENDIX C

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

This template includes model recommendations for SOPs between institutions and both prospective and approved values-based vendors.

[Insert Date]

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

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

[Institution Designated Contact]: [email]; [phone number]

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

2. *[Institution]* will provide prospective values-based vendors with orientation materials that give an overview of the purchasing program, outline vendor certification 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, *[Institution 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). *[Institution 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. *[Institution 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 or Institution's VBP announcement)]*.

5. If the values-based vendor wants to proceed, *[Institution Designated Contact]* will provide guidance and assistance in navigating the vendor certification process.

[Insert Date]

Standard Operating Procedures for Managing Values-Based Procurement: [Institution] & [Approved Values-Based Vendor]

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

[Institution Designated Contact]: [email]; [phone number]

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

2. [Institution Designated Contact] and [Values-Based Vendor Designated Contact] will discuss desired products, price points, quantities, and frequency. Based on these conversations, [Institution 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, [Institution Designated Contact] and [Values-Based Vendor Designated Contact] will establish a schedule for communication, purchasing, deliveries, and payment. [Institution Designated Contact] will also explain any flexibility [Institution] has to adjust schedules to accommodate vendor needs.

4. [Institution 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, [Institution Designated Contact] will provide that information to [Values-Based Vendor Designated Contact].

5. In the event of any concerns with delivered products (e.g., quality, quantity discrepancies), the [Institution Designated Contact] will reach out promptly to the [Values-Based Vendor Designated Contact] to discuss and resolve any issues. The goal will be to ensure continuous improvement and mutually beneficial outcomes for both parties.

6. Every [insert time interval], [Institution Designated Contact] and [Values-Based Vendor Designated Contact] will review the purchasing relationship, assess performance, address any challenges or concerns, and discuss whether adjustments or expansions are needed.

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