

Purchaser (Institution/Management Company) Orientation Factsheet Template

The Purchaser Factsheet Template below includes the model recommendations for institutions developing orientation materials for vendors.

[Institution]: Factsheet for Vendors

[Address]

[Website]

Email: [Email] | Phone: [Phone]

****For Institutions using food service management companies, “Management Company” may be substituted for “Institution,” where appropriate.****

Introduction

[Institution] is [enter short description of institutional mission or purpose]. A commitment to increasing purchases of [insert values identified in food purchasing guidelines] food is a key component of [Institution’s strategic plan or its other commitments, vision, or identity]. Through its food purchasing, [Institution] seeks to foster existing relationship and develop new relationships with [insert short description of vendor preferences, if relevant].

Examples of common strategic plans and commitments include:

- [Institution’s] mission/vision/identity statement;
- [Management Company’s] mission/vision/identity statement;
- Food Purchasing Guidelines;
- Food Safety Plan;
- Health & Nutrition Plan;
- Sustainability Plan;
- Climate Action Plan;
- Corporate Social Responsibility (CSR) or Environmental, Social, and Corporate Governance (ESG) Plan;
- Diversity, Equity, and Inclusion (DEI) Plan and/or commitments; or
- Membership and/or involvement in programs that encourage values-based procurement or partnerships with values-based organizations.

Examples of vendor preferences include, but are not limited to:

- Local vendors;
- Small and mid-sized vendors;
- Beginning vendors;
- Diverse vendors (BIPOC; MWBE; LGBTQIA+);
- Historically underserved producers (i.e. socially-disadvantaged; veteran; beginning; reduced resource);
- Culturally significant producers; or
- Vendors with particular certifications.

[Institution's Food Service/Dining Operations]: Program Spotlight

[Institution's] food operations are [self-operated; managed by Management Company]. [Institution] serves [insert short description of population served by various food operations, frequency, and type of meals]. [Insert notable details about population/frequency/meal types]. [Institution's Food Purchasing Guidelines] set the preferences and requirements for food purchasing and are available [on a website, attached to these orientation materials, or upon request].

Notable details may include but are not limited to:

- Age range of population served
- Food preparation requirements or restrictions (e.g., Kosher; Halal)
- Regular fluctuations in population served (e.g., higher education institution with decreased population Thursday-Sunday; institution with a set hybrid/remote calendar; education institution's weekly and academic calendar; entertainment institution with event-based purchasing)
- Serving specific meals (e.g., breakfast, lunch, dinner, snack, or a particular combination of these)

Working with [Institution], vendors can expect [insert benefits, advantages].

[Institution's] top products purchased include:

- [Insert list of top products purchased]

[Institution] seeks to purchase from:

- [Insert list of vendor preferences]

[Institution's Food Service/Dining Operations]: Key Administrative and Logistics Information

Vendor Eligibility: In order to sell to [Institution], vendors must complete [if self-operated, insert key requirements from the Institution's approval process; if through a management company, insert certification requirements from Institution's Management Company]. [If additional information about vendor eligibility and certification is available online, include the link.] If you have any questions about becoming an approved vendor, contact [Designated Contact] at [email; phone].

Kitchen/Food Preparation Capacity: [Institution] has [insert details about kitchen capacity including storage and prep space]. [Flag any particular limitations or preferences related to kitchen/food preparation capacity.]

Ordering Preferences: [Institution] purchases food to serve a total population of [insert total population served; include additional details about purchasing volume]. Orders are regularly placed [insert ordering frequency].

Delivery Preferences: [Institution] prefers food deliveries on [insert day(s)] from [insert time range]. Deliveries will be made to [insert address for delivery location and any special instructions or notes].

Payment Processes: *[Institution]* requires *[insert documents needed for processing payments]*. Payments will be made *[insert payment schedule]*.

Contact Us!

Interested in selling to *[Institution]*? Contact *[insert Designated Contact]*, *[insert title/role]*, to discuss any questions you may have and learn about next steps to begin selling to *[Institution]*.

[Designated Contact] is available at: *[email]*; *[phone number]*.