

Scaling Up Sales to Institutions

Sodexo Forum

November 7, 2012

Report to the Vermont **Farm to Plate**
Aggregation and Distribution Working Group

1/7/2013

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Scaling Up Sales to Institutions: Sodexo Forum

Report to Funder

Forum Overview

The idea for the Forum was hatched at what started out as a simple relationship building meeting between Sodexo's management team (Rick Riani, Melissa Zelazny and chef Brian Roper) and Vermont Sustainable Jobs Fund Executive Director Ellen Kahler, Vermont Agency of Agriculture, Food and Markets Local Foods Coordinator Abbey Willard, and ACORN's Annie Harlow on June 27, 2012. The meeting organized by Annie Harlow, on behalf of the *Aggregation and Distribution Working Group*, was meant to inquire about Sodexo's willingness to share their local food sourcing data annually, as part of a statewide effort to measure progress on reaching a number of Farm to Plate Strategic Plan goals.

A second meeting soon followed and this time also included John Stewart and Jennifer Wood of Sodexo's procurement office, Secretary Chuck Ross, and Joe Speidel from UVM, which laid the ground work for the November 7th forum on institutional large-scale purchasing. A central goal for the forum was for producers and processors to learn the language of and procedures for selling into the Sodexo procurement system, since many do not know how Sodexo makes purchasing decisions. An additional goal was to expose Sodexo to a greater diversity of Vermont products potentially available to them. Organizing the forum became a project of the Farm to Plate Network's *Aggregation and Distribution Working Group*.

The forum's design was aimed at building new relationships across the Vermont food shed. A diverse audience of farmers, processors, distributors, emerging food businesses, food hubs, and technical assistance providers were present. Organizers worked hard to ensure that participants were from all over the state and across all food categories, since Sodexo provides dining services in 14 locations throughout Vermont.

The event was by invitation only. A set of criterion was established as part of the selection process. Separate announcements were sent to Sodexo employees (based on their level of responsibility within the company) and to those farmers, food hubs and partnering organizations who organizers thought had sufficient interest in and readiness for institutional sales. All prospective attendees were then interviewed in order to better gauge their interest and readiness, as well as to provide clear expectation for what the forum was designed to accomplish. Nearly 80 people attended representing all the desired stakeholder groups. (See Appendices 3 and 4 for Invited Attendee list)

The forum's agenda had three presentation sessions. First, Procurement Manager, Jennifer Wood presented baseline information on Sodexo's purchasing parameters. This overview set the stage for a panel on linking Sodexo's procurement process to the supply chain with distributors and district chefs, all of whom reiterated key points from Jennifer's presentation. Forum participants had plenty of time to ask detailed questions to panelists. A second panel focused on sharing insights for the scaling up process and for developing supply chain connections. This panel featured two producers who shared their stories and insights into how they built relationships, scaled up their operations and started selling to Sodexo. A distributor and Sodexo chef and procurement manager were also part of this panel. Questions from the audience provided a great deal of depth to the information contributed by panelists. Additional time for open ended networking, added considerably to the success of the day. See Appendix 2 for complete agenda.

Sodexo Specifics

Sodexo has 14 food service locations in Vermont. Each meal service location is a different size and has unique needs, including the University of Vermont, the Vermont State Colleges, private colleges, various high schools, and corporate accounts. Statewide, Sodexo serves upwards to 34,000 meals per day, requiring yearly consumption of approximately 45,000 lbs of chef potatoes, 27,000 lbs of tomatoes, and 29,000 lbs of broccoli and opportunities to source products across all categories. See Appendix 5 for map and meal counts for Sodexo's Vermont accounts.

Forum attendees gained significant insights into the purchasing practices and sourcing specifications for Sodexo, as well as for Black River Produce and Best of Vermont, both of whom provide a wide range of products to Sodexo. A greater appreciation was gained about the balancing act played by Sodexo in meeting specific meal plan pricing constraints (as outlined in their competitively awarded contracts), and the wide ranging demands of their end customers. The Sodexo team was very forthcoming in their explanation of the different types of meal plans they offer and the degree of flexibility they can exercise when sourcing local products, for instance:



1) **Residential Meal Sites** (also known as “all you can eat” sites). This meal plan is plated up for less than \$3/day. Therefore, local food has to be very price-competitive to fit into the mix at this level. At most locations, this is a seasonal market that follows the school year. An abundance of mid-summer produce does not match well with demand, but there is opportunity for Sodexo chefs to process and flash freeze fresh produce, soups and sauces which can then be used throughout the year. While national brands and commodity products tend to be more the norm because of price constraints, some local producers have successfully found a way to make Sodexo's price point work for their operation.

2) **Retail Meal Sites** (also known as ala-carte meals). At these types of outlets, customers can exercise a great deal of choice because they are paying individually for each item. This presents increased opportunity for local food producers because the customer can choose to pay the added cost for a local, grass-fed hamburger, for instance. There are ample opportunities to build brand loyalty through storytelling and by labeling local products, thereby taking advantage of the end customer's interest in buying local.

3) **Catering Meal Sites** (also known as the special-events market). There is a great deal of flexibility to source local products at price points more attractive to producers and processors. These sites can also serve as a gateway to other Sodexo locations and types of outlets. Sodexo chefs can encourage local food purchases through their menu listings and do pass the added costs on to their customers. This option provides a good opportunity for chefs to source new products and builds long-lasting relationships with producers. The scale of purchases tends to be lower and is more viable at select Sodexo accounts such as universities and corporate accounts.

Understanding purchasing and distribution variables is critical for businesses interested in scaling up and evaluating their operations in order to gain a slice of the significant institutional sales market. Some participants definitely learned that they are not ready for institutional selling or at least not to Sodexo. Whether it was because of the strong emphasis on selling through a distributor, the pricing variables, labor issues or even cash flow, participants gained a much better understanding for *how* to evaluate and consider scaling up.

Sodexo is just one management company that has food contracts in Vermont. There are several other food service companies serving hospitals, the state prisons, other colleges, K-12 schools, and corporate kitchens around the state. Opportunities may exist to connect directly with one of these other companies or to establish relationships with Vermont distributors that already sell to these institutional accounts.

Examples of Producers Represented	Examples of Food hubs and Food System Partners	Examples of Sodexo Representatives
Meat: Vermont Salumi	Mad River Food Hub	Lyndon State
Dairy: Millborne Drinkable Yogurt	Intervale Center	Champlain College
Vegetable Protein: VT Bean Crafters	Castanea Foundation Real Food Challenge	Castleton College
Fresh Produce: Valley Dream	UVM Extension	World Learning
Snack Food: Garuka Bars	Lyndon State College	North Country High School

Forum Planning and Timeline

Organizing the forum took three months to plan and execute, in a format designed to inform and demystify selling to institutions. As mentioned earlier, a small number of attendees representing diverse food categories and regions of the state were selected through a vetting process. Sodexo offered to host the event at UVM, which is their largest account in Vermont.

What follows is a step by step review of actions taken by forum organizers in hopes that this outline will prove helpful as additional events are planned.



September: Organizers began crafting the language for the forum and developing the process for inviting attendees.

The exact meeting location was secured by Sodexo (Livak Ballroom at UVM). The participant selection criterion was developed by Annie Harlow (who was hired by VSJF as the project manager) and Abbey Willard (Local Foods Coordinator at VAAFAM). Invitations were based on leads from VAAFAM, VSJF, regional food hubs, statewide organizations (such as NOFA-VT and UVM Extension), and members of the Aggregation & Distribution Working Group. Announcements were sent September 25th to food hubs and select producers (see Appendix 1). Approximately 100 announcements were emailed utilizing our wide network of Farm to Plate partners. Scheduling pre-registration interviews began the last week of September.

October: Annie Harlow began potential participant interviews the first week in October and they were continuously scheduled throughout the month using a matrix of food categories and regions to ensure diversity. In addition, organizers worked with Sodexo to develop the agenda, forum format and who to invite as panelists. Sodexo, VAAFAM and VSJF each had distinct needs and interests to be accomplished by the event which had to be

incorporated into the agenda. Panelist selection was based on the agreed upon agenda topics. Each attendee received several emails and phone calls with additional details about what to expect at the forum.

Sodexo provided all the registration information in order to clarify terms and their procurement process. They worked closely with UVM to establish event needs regarding room layout and audio-visual technology. They also took care of all aspects of lunch and prepared registration packets and informational material (see Appendix 6).

November: Just prior to the event, organizers finalized the participant list, room layout details (coordinated by Paul Bahan from Sodexo Education with UVM Events and Conference Planning), registration packets (by Jennifer Wefers, Sodexo Education), and last minute details with panelists. After the event, organizers reviewed participant evaluation forms and developed this follow-up report which attempts to lay the ground work for future events with other food contract services and large scale institutional buyers.

Examples of Direct Positive Outcomes

While it's still too early to share a complete list of outcomes from the November 7th forum there are many favorable outcomes to note. Sodexo reports newly forged relationships and new local products that may soon be introduced at their various food service locations. Producers have ventured into conversations with distributors and processors have accessed new suppliers. Here is small sample of what we know to date.

Garuka Bars to work with a distributor for the first time: Mike Rosenberg of **Garuka Bars** had extensive conversations with Sodexo Procurement Managers John Stewart and Jennifer Wood at the end of the networking portion of the forum. Based on their suggestions, Mike has chosen Bonnie Kelsey of **Best of Vermont** to be his first distributor of Garuka Bars.

Hartshorn Farm plans to scale up to institutional sales: Dave Hartshorn of **Hartshorn Farm** in Waitsfield, wasted no time acting on key points from the forum. He visited Norwich University after meeting Sodexo chef Rob Macfarlane to discuss products and potential demand. Plans are already in place for students and food service workers to visit the farm and to keep abreast of activities through a webcam. While at the forum he also sought advice from technical assistance providers in attendance about how to create greater efficiencies in his new greenhouse operation. Efficiency Vermont has expressed interest in partnering with him on reducing production costs by changing out his current lighting as part of a pilot project. He later attended the *Financing the Working Landscape: Access to Capital Forum* on November 29, sponsored by Addison County Farm to Plate partners ACORN, ACEDC and ACRPC. Dave is looking ahead to utilizing many resources to scale up lettuce and salad greens production to meet the needs of Sodexo's Norwich University dining locations.

Valley Dream Farm plans to go regional: Anne Tisbert of **Valley Dream Farm** has been in contact with *Baldor Specialty Foods*, an approved Sodexo vendor in the Bronx, New York which serves the greater Metropolitan area. Anne is seeking to sell produce throughout the regional Sodexo network and is following up on a direct lead from John Stewart in procurement.

Forum Highlights

- ✓ Producers filled out the evaluations providing great feedback on the demystifying of sales to Sodexo
- ✓ By all accounts, the forum was a huge success in building new relationships
- ✓ Relationships were made and built upon by all participants
- ✓ Sodexo chefs learned a lot about local foods and production, as did producers & attendees
- ✓ Vetting and invitations were an important element for keeping the event focused
- ✓ There is keen interest in more forums

Producers and processors forged new supply chain relationships: Joe Bossen of *Vermont Bean Crafters* made arrangements with Justin Rich of *Burnt Rock Farm* to supply him with “B-grade” sweet potatoes. Justin saw the forum as a fantastic event to learn about Sodexo and to forge new outlets for products not sold in his established markets.

Local food advocates have gained useful new knowledge about how producers can sell to larger markets: Bonnie Colpitts of *Saint Johnsbury Area Local Food Alliance* is interested in improving local food sales to institutions, retailers and making food accessible to all. She has shared what she learned at the forum with her working board. In her evaluation of the forum Bonnie indicated that for her, a significant take away was the importance of using positive language during their meetings: *“Words like “win-win”, “building relationships”, “trust”, “and creating partnerships” are words and attitudes we will be consciously incorporating into our meetings. Our goal is to bring really local produce and products to our institutions, facilitate relationships and foster opportunities for a sustainable healthy local economy and local food for the health of our communities. With all of us working together I know that all challenges can be faced and figured out. Thank you for all you do for local food!”*

New knowledge is being shared across New England: Peter Allison, staffer for the *Farm to Institution New England (FINE)* network, has made contacts with several Sodexo outlets using his new found insights to better address issues of scale. He is also sharing what he learned at the forum with his broad regional network to influence more institutional purchases.

Sodexo moves the agenda forward: A snapshot of the response by Sodexo managers is impressive. John Benouski at **World Learning** in Brattleboro immediately contacted Mike Rosenburg of Garuka Bars. They negotiated introductory product sampling to assess interest for future purchasing. Tom Fondakowski is working with Jonathan Kaplan at **Lyndon State College** to promote local awareness on campus. Additionally, each chef in attendance gained greater insight into local food options beyond produce alone. Jon Vogt, Sodexo manager at **North Country Schools** in Newport, gained insights from which to build upon his relationship with Green Mountain Farm to School. The registration contact list provided help in forging new relationships and follow-up. Procurement and regional district managers have provided their corporate office with tangible relationship building results attesting to its success and a need to replicate the forum. John Stewart and Jennifer Wood have opened the lines of communication with regional distributors for those ready to expand outside of Vermont and capture a wider institutional market.

Attendee Feedback

Evaluations were part of the registration packet, but less than 50 percent were returned. Of those returned (primarily producers), it was clear that this first meeting was very informative and useful. In summary, the respondents liked the format and the reiterative process which reinforced Sodexo’s initial procurement process overview. Attendees appreciated what panelists contributed and liked that they represented all aspects of the supply chain. By all accounts, attendee expectations were met and they are better able to evaluate what it takes to sell to Sodexo. Everyone who responded indicated that they made new

Evaluation Highlights

- ✓ MORE FORUMS!
- ✓ Great lunch!
- ✓ “Thank you for all the different Sodexo perspectives!”
- ✓ “Reiterating the supply chain variables in different ways was very useful.”
- ✓ “A great introduction to contract selling”
- ✓ “I know I am not ready- but I learned I have to think about my operation in new ways to scale up”
- ✓ “Lots of great time to TALK to one another!”
- ✓ “Having chefs, distributors and producers was excellent.”
- ✓ “Audience asked great questions supporting the lines of inquiry from presenters.”

connections and enjoyed the cross section of food related businesses in Vermont who were represented. The registration packet and reference materials were found to be useful and were much appreciated. Again, for those who completed the evaluation, there was unanimous support for the invitation only vetting process as it proved useful in identifying those most likely to scale up their operations. Each sponsor organization indicated that all the goals of the pilot forum were met and the outcomes have been very favorable. A terrific example of the response we received came from Susan Alexander of **Vermont Switchel**: *“It was tremendously helpful. I estimate it would have taken me a minimum of 6 months to a year to make these same connections and receive the same information that I did in the one day workshop you and Abbey facilitated. I will be following up with both Sodexo and the distributors after the new year to talk about the next steps.”*

A separate evaluation was distributed to select food system partners who often attend forums, workshops and conferences. The Sodexo forum was favorably received with some comments that Sodexo did not provide enough information on how to get into a contract. All three presentation sessions were evaluated and each had a number of strong points. Some thought the Sodexo overview was not comprehensive enough (although producers indicated it as very good, as mentioned above). Participants appreciated how the panel sessions were moderated, allowing many constructive questions to get asked, although some respondents felt questions were not always in line with the content of the forum. Networking with diverse attendees throughout the day was considered a highlight and the level of “free time” added additional value. In following-up with those who attended the forum, it is evident that many new connections have been made and that each organization has taken steps towards intended forum outcomes.

Sodexo Insights

Regional managers within Sodexo regularly seek out opportunities to build upon their professional networks. The *Scaling Up Forum* allowed managers and chefs to collaborate and build relationships with state and local businesses and technical assistance providers. Statewide Sodexo managers and chefs were present to learn from farmers, producers, processors and distributors. Farm to Plate Strategic Plan goals were a new concept for Sodexo and one that they can now more easily embrace and help to achieve. As noted, since the November forum, Sodexo chefs have already met with area producers and provided new product ideas to approved vendors. Sodexo valued the representation of attendees from across the state.



As we all learned, it is about building relationships and telling our stories. Sodexo has shared the forum concept with their corporate office as a means of telling their story of working to increase local food purchases here in Vermont, which they believe can be translated to any state. Each manager and chef expressed appreciation for the event, new relationship building and their education of Farm to Plate goals.

Summary and Next Steps

The forum sponsors realized the value of the event from the conversations and stories that emerged at the forum. The overall goals of demystifying selling to Sodexo AND providing producer input on scaling up issues were successfully accomplished. Add to that the emerging business relationships, new business transactions that resulted from the forum and the opportunity to take this “Sodexo forum” pilot to other food service contractors

and large institutional buyers within Vermont has become even clearer. It should be reiterated that within a month after the forum, many new contacts and sales opportunities were created, which will help to advance Farm to Plate goals and suggests that more forums will produce similar results. Many people were unable to attend even though they would have passed the vetting process, which also supports the need for future events. Sodexo is interested in sharing this forum format with other regions of the country in hopes of reaching out to secure more local purchases and perhaps even organizing a forum with other food service contractors. Future forum planning considerations should take into account the extensive financial and staff support provided by Sodexo, which needs to be reflected in the true costs of organizing these types of forums.

Ideas for a second forum are:

- Early November worked well: farmers have a little more time opened up and Sodexo typically has a busy October
- Include other institutional buyers such as hospitals
- At future forums include broader representation from student groups and/or administrators from each site location
- Hold future events in other parts of the state

Institutional selling is not for everyone. The forum provided insights into working with distributors and institutional purchasers and in how to build relationships that take into account individual business needs all along the supply chain. Forums that bring together a wide network of producers, processors, technical assistance providers, food hubs and end users can play an important role in helping businesses scale up in sales and expand their operations in a way that can meet their financial needs. Organizers found that this forum provided numerous opportunities to better evaluate business operations and needs as well as improving business to business relationships.

Looking Ahead to the Next Forum: Suggestions from Attendees & Sponsors

- Keep the vetting process for invitations; having “pre-qualified” producers and processors in the room allowed for more in-depth conversations that have a better chance of leading to deal-making; also enabled clear expectations to be communicated in advance.
- Clarify roles and message for each panelist in order to balance out talking points with moderated Q & A period.
- Second session of panelists telling stories could just be a couple of producers and/or food manufacturers without the supply chain panelists responding. Possibly incorporate short producer stories in “elevator pitch format”.
- Sodexo overview of their procurement process could have more explanation diagrams.
- Keep the long lunch and end session for networking.
- Allow wide open Q& A as the questions and comments from the audience brought out more issues that tied into what the panelists and speakers were saying.
- Length of day was good (i.e., 9:30am – 3pm).
- Invite more administrators in colleges, high schools, contracted with Sodexo accounts.
- Use of technology: need full-time assistant present to make modifications as needed (e.g., panelists speaking into the projector light, changing power point images back and forth to Sodexo-Vermont map).
- Size of the room was perfect for the number of participants – room felt full but not crowded.
- Would be useful to have a designated photographer on hand to take good quality pictures for later use; also helpful to have designated note takers. Also useful to have someone identified in advance to write up a publishable article after the event.
- Utilizing food hubs and members of the Farm to Plate Network was key to identifying which producers and processors to invite; also include more outreach and involvement of federal and state agencies in helping to identify potential participants.
- The biggest challenge was in attaining a diverse set of attendees (i.e., across food categories and geography); interviews were critical to this process.
- Leave space available for last minute sponsor needs.
- Having sample products available for consumption was very helpful for producers seeking to work with distributors and to gain market visibility.
- Timing of the annual *Farm to Plate* Network Gathering helped build awareness of the forum and identified additional producers, key supply chain stakeholders, and food system experts to invite.
- A small organizing team worked well, in terms of efficiency on fast moving decisions.

Appendix 1: Forum Announcement

Scaling Up for Sales to Institutions

November 7
10:00 am - 3:00 pm
UVM Davis Center

New Opportunities for Institutional Selling!

This one day workshop will help growers, producers and distributors learn the ins and outs of selling local food products to schools, colleges and universities across the state. Sodexo provides food management services to the majority of Vermont's colleges and universities and oversees school food service and corporate kitchens in every corner of the state. Institutional demand for local foods is increasing across every production category and is not just limited to produce.

You are invited to this special five-hour event to gain an overview of how institutional buying with Sodexo may be possible for your operation. **Space is limited and registration of all attendees is contingent on a criteria-based interview conducted by Annie Harlow.**

The workshop will cover a range of topics aimed at building relationships among producers, distributors, and buyers including:

- Sodexo's procurement policies
- Products, volumes and form factors being sought
- Liability Insurance
- Distribution variables
- Payment structures to vendors
- Product packaging and standards
- Stories from current institutional vendors
- Role food hubs can play in sourcing local
- Vermont's definition of *local food*

This is a great opportunity to learn about expanding into new markets, gain insights into purchasing strategies and understand how Vermont producers can sell more food to institutions statewide through food hubs and standard distributors.

To inquire with questions or participate in the pre-attendance interview, please contact: Annie Harlow at ahhannieahh@yahoo.com or 802-922-7060.

Sponsored by Sodexo, the Vermont Agency of Agriculture, Food & Markets, NOFA-VT, and the Vermont Sustainable Jobs Fund.

This farm to institution initiative is supported by the VT Farm to Plate Aggregation and Distribution Working Group.

Appendix 2: Agenda



Scaling Up Sales to Institutions

November 7, 2012; 9:30am - 3:00pm

Livak Ballroom 4th Floor, UVM Davis Center, Burlington, VT

Agenda Overview:

9:30 REGISTRATION

10:00 INTRODUCTIONS FROM UVM, SODEXO and the SECRETARY OF AGRICULTURE, FOOD AND MARKETS

THE SODEXO PROCUREMENT PROCESS – Jennifer Woods

SESSION 1 PANEL: LINKING THE PROCESS TO THE SUPPLY CHAIN

Sodexo District Chefs: Brian Roper and Rob McFarland

Distribution Vendor and Products: Bonnie Kelsey of *Best of Vermont*; Mark Curran *Black River Produce*

Sodexo Procurement and Policy Overviews: Phil Harty and Richard Riani

12:15 Lunch and open networking time with slide show

1:15 **THE SODEXO PROCUREMENT PROCESS**, continued

SESSION 2 PANEL: INSIGHTS ON SCALING UP & CONNECTIONS

Producers: Scaling –Up the Business for Institutional Demand with Joe Bossen: *Vermont Bean Crafters*; Todd Pinkham: *Vermont Soy*; Ray Edwards *Vermont Highland Cattle*; George Keener *Vermont Food Venture Center*

Sodexo District Chef: Brian Roper, *Sodexo*

Distribution: Sean Buchanan, *Black River Produce*

Procurement and Policies: Phil Harty & Jennifer Woods, *Sodexo*

2:30 Open Networking and break-out session to follow-up on specific areas of interest with distributors, chefs, producers and procurement

3:00 **THANK YOU!**

Appendix 3: Invited Attendees

November 7, 2012 Scaling Up Sales to Institutions Forum

Category	Attendee	First	Last	E-Mail	area code 802 (unless noted)	Web
Beverage	Millborne Dairy	Kirsten	Quesnel	kkq4@yahoo.com	349-5776	millbornedairy.com
Beverage	VT Switchel	Susan	Alexander	vtswitchel@gmail.com	522-5898	vtswitchel.com
Cheese	Maple Brook Farm	Johann	Englert	johann@mountainmozerels.com	440-9950	maplebrookvt.com
Dairy	Kimball Brook Farm	Cheryl	Devos	kbvermont@gmail.com	734-6346	kimballbrookfarm.com
Dairy	Kingdom Creamery	Jeremy	Michaud	jpowers6@gmail.com	472-6700	kingdomcreameryofvermont.com
Dairy	Monument Farm	Bob	James	bj_mfd@gmavt.net	545-2119	vermontdairy.com/meet/farm/monument-farm
Dairy	Wilcox	Chris	Wilcox	wilcoxicecream@gmail.com	362-1223	
Distrib	Best of Vermont	Bonnie	Kelsey	bonnie@bestofvermont.com	773-6575	bestofvermont.com
Distrib	Black River Produce	Mark	Curran	mcurran@blackriverproduce.com	800-228-5481	blackriverproduce.com
Distrib	Black River Produce	Sean	Buchanan	sbuchanan@blackriverproduce.com	603-277-0670	blackriverproduce.com
Distrib	Deep Root	Anthony	Mirisciotta	anthony@deeprootorganic.comcastbiz.net	730-8126	deeprootorganic.com
Distrib	Mad River Food hub	Robin	Morris	admin@madriverfoodhub.com	498-7379	madriverfoodhub.com
Distrib	Farm to Table at Two Rivers	Daniel	Stein	dstein09@gmail.com	223-1515	tworiverscenter.org/farmtotable.shtml
Distrib	Vermont Roots	Kim	Crosby	kim@vroots.com	747-3312	vroots.com
Eggs	Pete & Gerry's Eggs	Todd	Russell	Todd@PetzandGerrys.com	603-770-3444	peteandgerrys.com
Frozen	Food Venture Center	George	Keener	george@hardwickagriculture.org	472-5362	vermontsalumi.com
Frozen	VT Refrigerated Storage	David	Dolignow	DDolignow@sunriseorchards.com	897-7400	vtstorage.com
Frozen	Cobb Hill Frozen Yogurt	Jeannine	Kilbride	cobhillfrozenyogurt@gmail.com	436-2948	cobhill.org/frozenyogurt
Grain	Gleason Grain	Ben	Gleason	gleasongrains@gmail.com	758-2476	gleasongrains.com
HUB	Green Mountain Farm to School	Katherine	Sims	ksims@gmfts.org	334-2044	greenmountainfarmtoschool.org
HUB	Mad River Food Hub	Robin	Morris	rsimorris@cmark.com	496-3100	madriverfoodhub.com
HUB	St J ALFA	Becky	Colpitts	loveandlight01@hotmail.com	603-991-8286	stjalfa.org
HUB	Windham	Hans	Estrin	hestrin@uvm.edu	257-7967 x 312	
HUB	RAFFL	Tara	Kelley	tara@rutlandfarmandfood.org	417-7331	rutlandfarmandfood.org
Meat	Highland Cattle	Ray	Edwards	ray.edwards@vermonthighlandcattle.com		vermonthighlandcattle.com
Meat	VT Salumi	Pete	Coleman	pete@vermontsalumi.com	454-8360	vermontsalumi.com
Snack	Garuka Bars	Mike	Rosenberg	info@garukabars.com	309-4997	GarukaBars.com
Snack	Laughing Moon Chocolate	Leigh	Williams	leigh@laughingmoonchocolates.com	253-9591	laughingmoonchocolates.com
Soup	Screamin' Ridge Farm	Joe	Bouley	jbouleyjr@comcast.net	461-5371	screaminridgefarm.com
Technical Assistance	Intervale	Sam	Smith	sam@intervale.org	751-9903	intervale.org
Technical Assistance	Intervale	Sona	Desai	sona@intervale.org	338-0067	intervale.org
Technical Assistance	Skagit Valley Farm	Tony	Wisdom	tony@raptorgroup.com	360-708.5474	

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Category	Attendee	First	Last	E-Mail	Area code 802 (unless noted)	Web
Technical Assistance	Skagit Valley Farm	Tony	Wisdom	tony@raptorgroup.com	360-708.5474	
Technical Assistance	Northeast Organic Farming Association	Abbie	Nelson	abbie@nofa.org	710-248-2114	nofavt.org
Technical Assistance	Northeast Organic Farming Association	Erin	Buckwalter	erin@nofa.org	434-4122	nofavt.org
Technical Assistance	Lyndon State College	Jonathon	Kaplan	Jonathan.Kaplan@lsc.vsc.edu	751-9903	
Technical Assistance	UVM Extension	Dennis	Kauppiila	dennis.kauppiila@uvm.edu	751-8306	
Technical Assistance	VT Agricultural Development Program	John	Ryan	vadp@vasj.org	828-3753	
Technical Assistance	VT Tech College	Steve	Paddock	sppaddock@vtc.vsc.edu	728-9101	VTSDC.org
Technical Assistance	Farm to Institution	Peter	Allison	peterallisonvt@gmail.com	436-4067	
Technical Assistance	Farm to School	Emily	French	emily.farmtoschool@gmail.com	413-253-3844	
Student Champions	Real Food Challenge	David	Schwartz	david@realfoodchallenge.org	401-601-5545	realfoodchallenge.org
Veg	Burnt Rock	Justin	Rich	burntrockfarm@gmail.com	434-7170	burntrockfarm.com
Veg	Hartshorn Farm	Dave	Hartshorn	davehartshorn@gmavt.net	279-8054	davesfarm.wordpress.com
Veg	Lalumiere Farm	Karolyn	Lalumiere	klalumiere@yahoo.com	349-7782	
Veg	Norris Berry Farm	Norma	Norris	norrisberryfarm@gmavt.net	999-3420	norrisberryfarm.com
Veg	Westminster Organics	Evan	Harlow	westminsterorganics@myfairpoint.net	722-9203	harlowfarm.com
Veg	Pete's Greens	Tim	Fisburne	tim@petesgreens.com	586-2882	
Veg	Valley Dream	Anne	Tisbert	valleydreamfarm@myfairpoint.net	644-6598	valleydreamfarm.com
VProtein	Earth Sky Time	Oliver	Levis	earthskytime@gmail.com	384-1400	earthskytime.com
VProtein	Rhapsody Natural Foods	Sjon	Welters	elyshawelters@gmail.com	563-2172	rhapsodynaturalfoods.org
VProtein	Vermont Bean Crafters	Joe	Bossen	vtbeancrafters@gmail.com	325-2144	vtbeancrafters.com
VProtein	VT Soy	Todd	Pinkham	info@vermontsoy.com	472-8500	vermontsoy.com
Organizer	Organizer	Annie	Harlow	ahsnnieshh@yahoo.com	922-7060	
Organizer	Vermont Agency of Agriculture, Food and Markets	Abbey	Willard	Abbey.Willard@state.vt.us	272-2885	
Sponsor	Vermont Agency of Agriculture, Food and Markets	Chuck	Ross	Chuck.Ross@state.vt.us	828-1619	
Sponsor	Vermont Sustainable Jobs Fund	Ellen	Kahler	ellen@vsjf.org	828-5320	

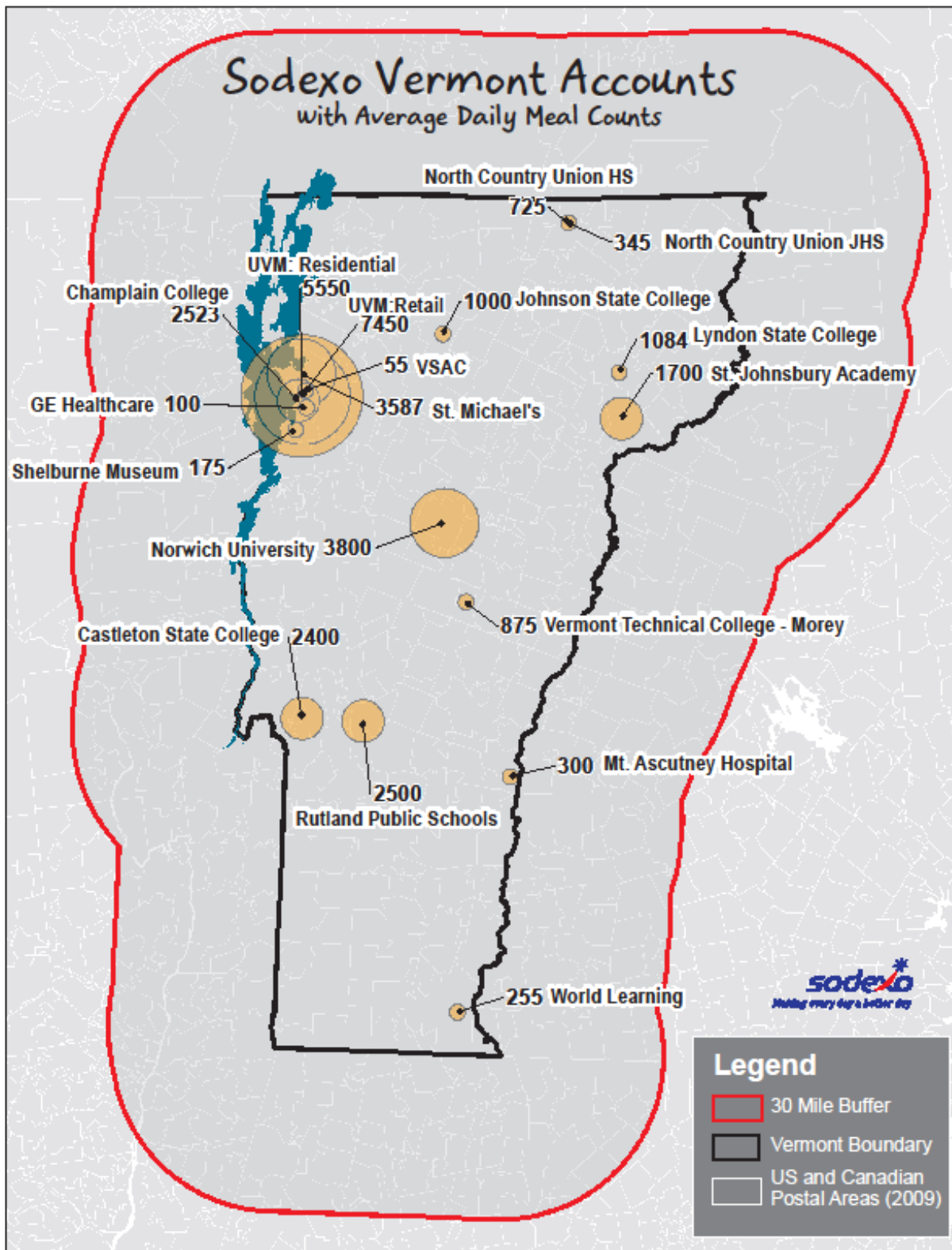
Appendix 4: Sodexo Attendees

Sodexo Account Contact List

Sodexo Accounts	District Managers	Towns in Vermont	Contact Person	E-Mail
Castleton State College	Harty	Castleton	Jeff Kurto, General Manager (GM)	Jeff.Kurto@sodexo.com
Champlain College	Riani	Burlington	Ted Digrane, GM	Ted.Digrande@sodexo.com
Ge Healthcare Technologies	Riani	South Burlington	Barbara Opara, Manager	Barbara.Opara@sodexo.com
Johnson State College	Harty	Johnson	Tom Fondakowski, GM	Thomas.Fondakowski@sodexo.com
Lyndon State College	Harty	Lyndonville	Joseph McClain, GM	Joseph.McClain@sodexo.com
Mt Ascutney Hospital	Dupuis	Windsor	John Frisbee, GM	John.Frisbee@sodexo.com
North Country High School	Rocco	Newport	John Vogt, GM	John.Vogt@sodexo.com
Norwich University	Harty	Northfield	Scott Rossen, GM	Scott.Rossen@sodexo.com
Rutland City Public Schools	Rocco	Rutland	Marty Irion, GM	Martin.Irion@sodexo.com
Shelburne Museum	Riani	Shelburne	Ted Digrane, GM	Ted.Digrande@sodexo.com
St Johnsbury Academy	Rocco	St, Johnsbury	Christopher Rhoades, GM	Christopher.Rhoades@sodexo.com
St. Michael's College	Riani	Colchester	Hank Strashnick, GM	Henry.Strashnick@sodexo.com
University of Vermont	Riani	Burlington	Melissa Zelazny, GM	Melissa.Zelazny@sodexo.com
Vermont Student Assitance Corp (VSA)	Riani	Winoosk	Ted Digrane, GM	Ted.Digrande@sodexo.com
Vermont Technical College	Harty	Randolph Center	Kristen Zagranski, GM	Kristin.Zagranski@sodexo.com
World Learning Institute	Harty	Brattleboro	John Benouski, GM	John.Benouski@sodexo.com
District Managers			Business Sector	E-Mail
Richard Riani			Campus	Richard.Riani@sodexo.com
Phil Harty			Campus	Phil.Harty@sodexo.com
Cathy Rocco			Schools	Cathy.Rocco@sodexo.com
David Marquis			Healthcare	David.Marquis@sodexo.com
District Chefs				
Brian Roper	Riani	Burlington, VT		Brian.Roper@sodexo.com
Rob MacFarlane	Harty	Keene, NH		Rob.MacFarlane@sodexo.com
Sodexo Procurement Services				
John Stewart				John.Stewart@clientps.com
Jennifer Wood				Jennifer.Wood@clientps.com

November 7, 2012

Appendix 5: Sodexo Accounts and Meal Counts



Appendix 6: Resources for Scaling-Up

Scaling Up sales to Institutions: Follow-Up Resources



"Sodexo's work, in partnership with our clients, and in service to our customers, demands a deep and unwavering commitment to sustainability and the environment, as well as to the vitality of the communities in which we do business. It is a business and moral imperative, central to our values and the Quality of Life Services we provide to millions of people every day."

The Forum suggests these resources for scaling up businesses to meet the Farm to Plate goals of building good strong businesses, and relationships and to meet Sodexo's commitment to communities:

- NOFA Institutional Demand and Infrastructure 2012 Survey: *Scaling Up Vermont's Local Food Production, Distribution, and Marketing*, provides producers with quantifiable information for scaling up production for institutions as well as, information about the current challenges and opportunities in institutional supply-chain infrastructure:
nofavt.org/market-organic-food/farm-institution/report
- VT Sustainable Jobs Fund: Farm to Plate Network Strategic Plan:
vsjf.org/project-details/5/farm-to-plate-initiative
- Sodexo: Building a Better Tomorrow:
sodexousa.com/us/en/citizenship/citizenship.asp
- Vermont Farm Viability: Business Development
vhcb.org/viability.html
- VT Sustainable Jobs Fund: Technical Assistance for Scaling Up:
vsjf.org/what-we-do/peer-to-peer
- VT Technical College: Continuing Ed & Workforce Development
vtc.edu/cewd
- VT Agency on Commerce and Community Development Resources for Entrepreneurs:
accd.vermont.gov
- VT Agency of Agriculture Food and Markets:
vermontagriculture.com



Appendix 7: Sodexo-Vendor Contracting Process Materials



Sodexo Unit Managers and Contracted Vendors interact frequently. Depending on the situation, there are various steps to take to ensure that a vendor is following processes set in place by Sodexo. Here are some frequent examples of how vendors approach operators and how you should respond:

What if a vendor contacts an operator and says I have a vendor number?

Your first step is to contact the Client Procurement Services Call Center at 866.368.3472, provide the vendor number and ask what the compliance status is for that vendor. A vendor ID number only means that the vendor gets paid through the Sodexo system. It does not necessarily mean that the vendor is contracted or compliant. The vendor is only contracted and compliant if they have worked through Supply Management and have a negotiated contract on file with Sodexo. The Vendor Action Request (VAR) process will only allow for a non-contracted/non-compliant vendor to be set up for payment.

What is the process to get new vendors contracted?

You need to determine if the product you are seeking out is unique or if there is already a contracted vendor that offers the product or one similar. To determine this, e-mail or call the Client Procurement Services Call Center at CallCenter.USA@clientPS.com or 866.368.3472. If you feel that there is a need for the vendor and/or product, your Regional Account Manager (RAM) or the Client Procurement Services Call Center can research this for you to determine if a contract already exists.

Required documentation from the unit and vendor is required in order for the vendor number to be established. Log on to SodexoNet and type "VAR Set-up" in the search box to locate the forms.

What if a vendor contacts an operator and shows an interest in being a Sodexo Vendor Partner?


We have a no solicitation policy and vendors are not allowed to directly solicit business through operators. Call the Client Procurement Services Call Center and they will contact your RAM.

What is the process for a vendor becoming a Sodexo supplier?

Once a Regional Account Manager (RAM) determines a contract is warranted, the corresponding Supply Manager is contacted. Supply Managers, through Strategic Sourcing, negotiate contracts and develop relationships with Sodexo's vendor partners.

1. If the need exists, the Supply Manager will contact the vendor and begin the Vendor Action Request (VAR) process and the negotiation of a formal contract.
2. The Vendor Action Request (VAR) process is extremely important to our business and each contracted vendor follows the same procedure. It includes completion of a W-9, certificate of insurance, indemnification agreement and a third party HACCP audit, which is a cost to the vendor. Timing is up to the vendor to get the paperwork done and schedule their audit. Every vendor has to go through this process.

If you have any questions, please contact the Client Procurement Services Call Center at 866-368-3472 or e-mail CallCenter.USA@clientPS.com.

	Product Quality Assurance – Supplier General Requirements			Document #:	2.1.1
				Rev. #:	1
Document Location:	Product QA Manual	Document Owner:	Director PQA	Rev. Date:	01/30/2012
Issue Date:	01/30/2012	Approved By:	Sr. Director QAFS	Page 1 of 6	

Food Safety and Food Security Authorization Requirements

All food suppliers, including producers, manufacturers and distributors, must provide proof that they have a proactive food safety and food security program in place which meets or exceeds Sodexo Product Quality Assurance requirements. Food safety and food security programs should address each of the following technical topics (see below for more details):

- Regulatory Compliance
- Food Safety Programs (HACCP, GMP's, GAP's, Training)
- Sanitation Programs (SSOP's)
- Building and Facilities
- Pest and Rodent Control
- Plant and personnel practices
- Receiving , Storage and Distribution
- Processing Standards
- Packaging and Labeling
- Food Security / Defense
- Recall, Withdrawal and Stock Recovery

Individual supplier authorization requirements will be based on the food product(s) risk level as evaluated by the Sodexo Product Quality Assurance. The table set forth in **Exhibit 1** attached is designed to be a guideline to help determine the risk group and category of a supplier. Sodexo reserves the right of flexibility when determining risk levels.

One of the two options below must be fulfilled for each food supplier location. Option 1 is the preferred authorization method. **Option 2 will require pre-approval from the Sodexo Product Quality Assurance Department.**

Option 1

Food suppliers must undergo an audit or certification process by a Sodexo approved third party auditing firm (see **Exhibit 2** attached for a list of a Sodexo approved third party auditing firms) with the frequency required by Sodexo Product Quality Assurance Department based on the risk level of the food products. The audit must cover the technical areas listed above as they may apply to the location being audited.

Option 2

Food suppliers must submit a detailed, documented food safety and food security plan or program to Sodexo Product Quality Assurance. Documented plans and programs should cover the technical areas listed above where and when applicable. This Option 2 will require pre-approval from the Sodexo Product Quality Assurance Department.

Additional Requirements

- Food suppliers will be required to meet or exceed Sodexo's category specific Product Quality Assurance "Specifications" (e.g. Fresh Produce, Ground Beef, Raw Meat and Poultry, Seafood, Dairy, Eggs...) as determined by the Supply Management and Product Quality Assurance Departments.
- Technical data sheets in Sodexo's approved format for all food products upon request.

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Fax Cover Sheet for New Food Vendor Set-Up

Send Complete Package to Client Procurement Services Call Center via

FAX: 610 366 5351 or

EMAIL: CallCenter.USA@clientPS.com

Date:	
Vendor Name/Number:	Unit Contact:
Reason for VAR:	Unit Contact Phone Number:
Number of Pages Including Cover Sheet:	Unit Number:

VARs that are not correctly submitted will incur a delay in processing. No VAR documentation will be accepted or processed directly from vendors.

Required documentation for all new food VARs include:

- Vendor Action Request Form (VAR):** Completed by Unit Requestor.
 - Unit #, name and signature
 - **Comments Section** to include **type of product / service the vendor provides.**
 - Complete Unit's **Division**
 - **Carefully read and answer Yes or No** question (CP 101). Unanswered question will result in return of vendor request.
- W-9 Form (Tax Payer Identification Number and Certification):** Signed and Dated by vendor
- Actual/Sample Invoice:** Invoice must contain the remittance address.
 - If vendor bills by document other than invoice, have vendor submit letter on their letterhead stating they only invoice by statement, ticket, etc.
- Certificate of Liability Insurance:** Obtained by vendor.
 - **Sodexo must be listed as additional insured and certificate holder.** Please see the attached Schedule 1 for insurance coverage requirements and sample document for exact verbiage required.
- Sodexo Indemnity Agreement:** Signed and dated by vendor.
 - Altered agreements will not be accepted.
- Sodexo Audit Request Form:** Completed by vendor
- Sodexo Letter of Intent:** Completed by vendor
- Sodexo Supplier Diversity Vendor Business Profile:** If applicable

Sodexo Diverse Vendor Programs by Supply Management



Sodexo is committed to supporting Diverse Vendor partners. Our network of Diverse Vendors include national and regional partners with a wide variety of products to select from.

○ Sodexo's Definition of a Diverse Vendor

- A Minority, Women, Disabled, Veteran, or LGBT (Lesbian, Gay, Bisexual, Transgender) -owned business that is at least 51% owned, controlled and operated by one of the diverse classifications listed above. To be certified as a diverse business in the United States, their place of business must be located within the United States or its provinces. The owner must also be a U.S. citizen.
 - "Minority group members" in the US include Asian, Black, Hispanic and Native American.
- "Minority group members" are defined as Asian, Black, Hispanic and Native American U.S. citizens. A minority group member is a U.S. citizen with at least 25% origin from Asian-Indian, Asian-Pacific, Black racial groups of Africa, true-born Hispanic heritage and/or Native American geographies.
- M/WBE, a term that is often used, is the abbreviation for Minority Women Business Enterprise.
- There are third party organizations and/or the government that certifies the above groups as being certified diverse vendors in the United States.

○ How does working with Diverse Vendor partners benefit your operation?

- Working with Diverse Vendor partners allows you to meet your customer satisfaction and operational goals by:
 - Satisfying customers' tastes for authentic and ethnic recipes/flavors
 - Supporting your local community
 - Providing Supplier Diversity as a point of differentiation/value add to our clients
 - Meeting our clients needs for supplier diversity spend
 - Utilizing vendors who can quickly adapt to clients' needs

○ How to Request a Supplier Diversity Report for your Unit

- Contact your Regional Area Manager (RAM) for a report of your diversity spend for your unit.
 - Provide the time period for the report, with all account numbers to be included and to whom it needs to be sent.
 - Indicate if this is a one time only need or if you require regular reports (quarterly or annually).
- A total Sodexo company spend report is also available upon request.

○ What to Do if a Diverse Supplier Contacts You

- If you know of a diverse vendor who would add value to Sodexo, have them register on our Supplier Diversity website so they can be reviewed for potential opportunities with our company:
 - Web Address: <http://www.sodexousa.com/us/en/citizenship/diversity/supplier/supplier.asp>
 - It is located on the supplier diversity page under corporate citizenship on our corporate website <http://www.sodexousa.com>.
- If you like the vendor's product or services, let your Regional Account Manager know. Your Regional Account Manager is part of the diverse vendor review process and unit interest or need is important to understand.

○ How You Can Increase your Unit's Diverse Supplier Spend

Talk to your Regional Account Manager to make sure you are using all the potential vendors available to you through Prime and direct distribution.

- For a full list of Regional and National Diverse Vendors, log on to SodexoNet and type "Supplier Diversity" into the Search box. Click on "For Our Managers".
 - If a diverse vendor's product is not stocked in your market, work with your Regional Account Manager and other units to gain enough usage to bring the product into stock.
- When setting up a new vendor, make sure to have the vendor complete a "Supplier Diversity Business profile" and return it to the Call Center along with the other required paperwork.

For additional information on Sodexo's Supplier Diversity Programs,
please contact SupplierDiversity.Noram@Sodexo.com.

If you have any questions, please contact the Client Procurement Services Call Center
at 866-368-3472 or email CallCenter.USA@clientPS.com.

Sodexo's Regional Account Managers by Supply Management



While the Call Center is available to provide timely answers to your everyday procurement-related questions, your Regional Account Manager works in an advisory role to support your effective utilization of Sodexo's Supply Management Program.



Regional Account Managers can assist with:

○ Compliance/Contract Utilization

- Develop strategies to enhance compliance at a district or unit level.
 - Identify and communicate cost savings opportunities available through approved, contracted vendors.
 - Conduct opportunity assessments to show additional cost savings and/or conversions to higher quality or higher yielding products.
 - Provide reports that show unit or division level compliance percentages and areas for increased compliance opportunities.
- Provide education with regard to specific food products/categories, Environmental Services and Facilities products and services, equipment and supplies.
- Involve vendors and brokers in unit and district level activities as necessary to enhance the understanding of utilization of key contracted products.

○ Problem Solving

- Facilitate supplier conversions to approved prime and regional distribution programs.
- Reach resolution to service-related issues pertaining to a unit's food and supplies procurement program.
- Support resolution of financial issues, such as an incorrect invoice.
- Support disaster preparedness and recovery activities throughout the year and on demand as needed.
- Help resolve food Quality Assurance (QA) concerns associated with contracted Sodexo products by working with Quality Assurance Team members at Corporate Headquarters.

○ Education

- Assist units in meeting the requirements of their operating division at the unit level.
- Provide updates on Sodexo contracted program changes and/or enhancements.
- Share communications and resources pertaining to products and industry or consumer trends related to Sodexo's Supply Management Program.
- Provide support related to Sodexo and supplier technology platforms such as *The Market Connection*.

○ Set Up New Accounts

- Provide an introduction to Sodexo's Supply Management resources, policies and systems.
- Assist in establishing and utilizing their ordering systems.
- Provide information on contracted regional and direct store delivery programs.
- Identify and provide listings of approved vendors for each new unit.

When to Use the Call Center

To support your everyday needs, the Client Procurement Services Call Center can provide assistance in resolving delivery issues, identifying supplier contacts and researching a source for a specific product need. The Call Center can provide education about programs available to meet a specific need (for example, frozen dessert programs), product-related equipment programs (cookie ovens, for example), disaster preparedness resources and more.

The Client Procurement Services Call Center
866-368-3472
CallCenter.USA@clientPS.com