

Instructions for use: Sample Letter for the Distributor or Group Purchasing Organization, responding to Request for Proposal, to use with their Product Manufacturers to obtain accurate product sustainability attribute information (supports Sustainable Food Scorecard usage). Adapt to relevant data systems as needed.

Dear Manufacturer,

Our shared customer, Kaiser Permanente, utilizes your product(s) on their nutrition services menu.

As a health services provider, with a strong commitment to the human and environmental health of the communities it serves, Kaiser Permanente has developed a sustainable food policy and plan. As part of this plan, they track the progress of their foodservice sustainability spending against corporate goals.

We are supporting Kaiser Permanente with this initiative by updating and improving the accuracy of key sustainability criteria in our manufacturer files for reporting purposes. We are prioritizing your products that Kaiser Permanente specifically uses.

Please complete the following Report for each product carried that meets sustainability criteria listed in Sustainability Criteria Guide below. Return the completed form electronically to: **<Distributor Name and Contact Information>**

Thank you for your assistance with this important project.

Sincerely,

<Distributor Name

Product Report

Brand	Pack	Description	Manufacturer Code	Distributor Product #	Sustainability criteria*

Add lines as needed

***Sustainability Criteria Guide**

Use the following criteria and related codes to identify sustainable products in product report.

Criteria Code	Sustainability Criteria by Product Category	Criteria apply to these food items <u>only</u>.
MEAT, DAIRY, POULTRY, EGGS		
A	Local (grown/ raised and processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.
B	Raised without antibiotics/no antibiotics administered	Beef, bison, lamb, pork, poultry, eggs, dairy
C	Certified Humane Raised and Handled	Beef, bison, lamb, pork, poultry, eggs, dairy.
D	Animal Welfare Approved	Beef & dairy cattle, bison, lamb, pork, poultry (chickens, turkeys, ducks and geese), sheep, goats.
E	rBGH/rBST-free	Dairy.
F	100% Grass Fed	Beef, bison, lamb, dairy.
G	American Grass Fed	Beef, bison, goat, lamb and sheep.
H	Raised without added hormones/no hormones added	Beef, bison, lamb.
I	USDA Certified Organic	Beef, bison, lamb, pork, poultry, eggs, dairy.
J	Food Alliance Certified	Beef, bison, lamb, pork, poultry, eggs, dairy.
K	Salmon Safe	Beef, bison, lamb, dairy, eggs.
SEAFOOD		
A	Local (grown/ raised and processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.
L	Clean Fish	Seafood - wild caught, seafood-farmed.
M	Wild	All seafood.
N	Monterey Bay Aquarium (MBA) ranking (must be "Super Green," Health "Best Choice," "Best," or "Good" ranking)	Seafood - wild caught, seafood-farmed.
O	Certified by Marine Stewardship Council (MSC) and <u>Low in Mercury</u>	Seafood - wild caught.
P	Certified by Marine Stewardship Council (MSC)	Seafood - wild caught.
Q	Farm/Fishery Certification Status	Seafood - wild caught, seafood-farmed.
OTHER FOODS		
A	Local (grown/ raised and processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.

R	Local (grown/ raised <u>and</u> processed within a 250-mile radius of facility) AND produced on a small- to medium-scale farm*	Fruits and vegetables.
S	Fair Trade Certified	Grains-flours-pasta, fruits, vegetables, coffee, tea, sugar, chocolate, cocoa, nuts.
T	Rainforest Alliance Certified	Fruits, coffee, tea, juice, chocolate, cocoa.
U	Non-GMO Project Verified	Corn, soy, canola, sugar beets, squash or papaya, and processed foods that contain corn, soy, canola, sugar beets, squash or papaya, and any of their derivatives. (<i>Note: List may expand as other GMO products are developed.</i>)
I	USDA Certified Organic	Vegetables, fruit, grains/legumes, coffee/tea, fruit juice, sugar, nuts, oils, wine, processed items.
J	Food Alliance Certified	Vegetables, fruit, grains/legumes, coffee/tea, nuts, oils, processed foods.
K	Salmon Safe	Fruits, vegetables, wine.
V	Bird Friendly	Coffee.

DISPOSABLE FOOD AND NON-FOOD SERVICE WARE

W	Environmental Choice-EcoLogo Certified-Green Seal Certified	Disposable food or non-food service ware, e.g., napkins, paper towels, kitchen towels, tray liners, coated and uncoated paper, paper products used in food preparation, other.
X	Contains 100% Biobased Coatings	Disposable food service ware.
Y	Certified by USDA to Contain 95 percent or greater biobased content	Disposable food or non-food service ware.
Z	Certified Compostable	Disposable food or non-food service ware.
AA	Contains greater than 10 percent post-consumer recycled content	Disposable food or non-food service ware.
BB	Manufactured without Chlorine or Chlorine Compounds <u>OR</u> Certified Processed Chlorine Free or Totally Chlorine Free (PCF/TCF)	Disposable food or non-food service ware.
CC	Forest Stewardship Council Certified (FSC 100%, Mixed Sources or Recycled)	Disposable food or non-food service ware.
DD	No Chemicals of High Concern Intentionally Added to Product	Disposable food or non-food service ware.
EE	No Organohalogens Intentionally added to product	Disposable food or non-food service ware.

***Definition: Small- to medium-scale farms** tend to be run by family farmers who have a vested interest in their communities and are more likely to use sustainable farming techniques to protect natural resources and human health. They are an important part of the rural economy, preserve green space with the community, and serve as responsible stewards of the land.

Definition of small- to medium-sized farms can be based on size and/or income:

- a) Size = under 300 acres (used by California Alliance with Family Farmers)
 - Small: 1-50 acres
 - Medium: 50-300 acres
- b) Income (based on USDA definition of small- and medium-sized farms)

- Small: Less than \$250K revenue
- Medium: Up to \$1M revenue

Instructions for use: Sample Letter to potential vendors to accompany RFP (and Sustainable Food Scorecard). Adapt to relevant data systems as needed.

To: <Potential Food Vendor>

Thank you for your interest in working with Kaiser Permanente. At Kaiser Permanente we understand that our mission as a health care organization extends to the food we purchase and serve in our patient and cafeteria food service, and we seek partnership with vendors that align with, and help us to fulfill, this mission. To that end, we are evaluating potential food vendors/food suppliers on their ability to support our ***sustainable and local food purchasing goals***.

Enclosed in this Request for Proposal, you will find the ***Sustainable Food Scorecard***. We ask that you complete this scorecard, working with your suppliers to obtain the information we are seeking. There are multiple sheets in this toolkit, inquiring about the sustainability of your operations, your ability to provide labeling and tracking for sustainability criteria and finally about product availability in specific categories. The first sheet in the document provides instructions for completing the tool. The final sheet provides a full description of the third party certifications and label claims that we have determined most meaningful to our procurement goals.

We understand that this is a new process and a comprehensive tool and are available to help you in understanding and completing this assessment tool. We thank you for your cooperation and look forward to learning more about your company and the services that you might provide.

Sincerely,

<Hospital food service representative>

Sustainable Food Questions for RFPs:

- 1) Please describe your company's vision and strategy surrounding sustainable, local, and environmentally friendly purchasing of food and non-food items.

- 2) Kaiser Permanente has a goal of surpassing 20% sustainable food spend by 2015. Please see the attached **Letter to Vendors** and **Letter to Manufacturers**, and complete the attached **Sustainable Food Scorecard** to submit with your proposal (see attached documents).

- 3) Are there any markup variations between local/sustainable food products and non-local sustainable food products in the same categories?

There may be additional questions depending on whether the contract is for food, food service, distribution, etc.

Sustainable Food Scorecard

Acknowledgements: The Sustainable Food Scorecard and accompanying resources were developed by Kathleen M. Reed of Kaiser Permanente with support from Health Care Without Harm, with contributions from Marie Kulick, Gretchen Miller, and Emma Sirois.

Instructions for Use

1. For all food and non-food category spreadsheets,
 - a. List all items you can provide which meet any of the sustainability criteria (Third Party Certifications or Label Claims) in columns K-U. *Add as many rows to the spreadsheets as necessary to provide a comprehensive list of your sustainable product offerings in each food and non-food category.*
 - b. Every cell in Columns A-J must be completed for each listed item.
 - c. Definitions and expectations for each column in the food and non-food category spreadsheets is provided below under Field Specifications.
 - d. Data must be provided in the format within each spreadsheet. Although the worksheet formatting is protected, additional rows may be inserted to spreadsheets to add items by going to Home, Insert, Insert Sheet Rows.

2. Our organization's goal is to obtain affordable environmentally friendly products to provide to our patients, members and staff. Our objective in obtaining the requested information is to determine whether you can meet our sustainable food purchasing requirements.

Field Specifications

Field Name	Required Field	Data Type	Format	Additional Field Description / Instruction
Supplier Name	Y	Alphanumeric		e.g., Dean Foods - So. Cal
Supplier Sku Number	Y	Numeric		
Distributor Item Description	Y	Alphanumeric		e.g., TRU MOO LOWFAT 1% CHOC PLASTIC
Manufacturer Number	Y	Numeric		
Manufacturer Part Id	Y	Numeric		
Brand Description	Y	Alphanumeric		e.g., Alta Dena
Pack Quantity	Y	Numeric		Quantity of product within a pack.
Pack Size	Y	Alphanumeric		Number of products
Product Category	Y	Alphanumeric		E.g., for meat - frozen, fresh; for produce - fruit, vegetable
Product Sub-Category	Y	Alphanumeric		E.g., for dairy - milk, yogurt, cheese
USDA Certified Organic	N; only if applicable to product	Numeric		Input "1" if product is indicated for use in Neonatal or Pediatric and "0" for not
Food Alliance Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Certified Humane Raised & Handled	N; only if applicable to product	Numeric		Input "1" for yes.
Animal Welfare Approved	N; only if applicable to product	Numeric		Input "1" for yes.
Salmon Safe	N; only if applicable to product	Numeric		Input "1" for yes.
rBGH/rBST-free	N; only if applicable to product	Numeric		Input "1" for yes.
USDA Grass-Fed	N; only if applicable to product	Numeric		Input "1" for yes.
Fair Trade Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Rain Forest Alliance Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Protected Harvest	N; only if applicable to product	Numeric		Input "1" for yes.
Raised Without Added Hormones	N; only if applicable to product	Numeric		Input "1" for yes.
Raised Without Antibiotics	N; only if applicable to product	Numeric		Input "1" for yes.
Common Name	N; only if applicable to product	Alphanumeric		Input common name of fish species.
Scientific Name	N; only if applicable to product	Alphanumeric		Input scientific name of fish species.
Food Alliance Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Seafood Watch-Super Green or Healthy "Best" Choice	N; only if applicable to product	Numeric		Input "1" for yes.
Seafood Watch "Best" or "Good" Choice	N; only if applicable to product	Numeric		Input "1" for yes.
Marine Steward-ship Council Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Bird Friendly	N; only if applicable to product	Numeric		Input "1" for yes.
Non-GMO Project Verified	N; only if applicable to product	Numeric		Input "1" for yes.
Contains Zero Grams Trans-fat	N; only if applicable to product	Numeric		Input "1" for yes.
Green Seal Certified	N; only if applicable to product	Numeric		Input "1" for yes.

Environmental Choice/ EcoLogo Certified	N; only if applicable to product	Numeric		Input "1" for yes.
Certified Compostable	N; only if applicable to product	Numeric		Input "1" for yes.
Forest Stewardship Council Certified (FSC 100%, Mixed Sources or Recycled)	N; only if applicable to product	Numeric		Input "1" for yes.
Certified by USDA to Contain 95% or greater biobased content	N; only if applicable to product	Numeric		Input "1" for yes.
Contains 100% Biobased Coatings	N; only if applicable to product	Numeric		Input "1" for yes.
Contains >10% post-consumer recycled content	N; only if applicable to product	Numeric		Input "1" for yes.
Manufactured W/Out Chlorine or Chlorine Compounds	N; only if applicable to product	Numeric		Input "1" for yes.
No Chemicals of High Concern Intentionally Added to Product	N; only if applicable to product	Numeric		Input "1" for yes.
No Organohalogens Intentionally Added to Product	N; only if applicable to product	Numeric		Input "1" for yes.
Forest Stewardship Council Certified (FSC 100%, Mixed Sources or Recycled)	N; only if applicable to product	Numeric		Input "1" for yes.

Scorecard Tool for Vendor Selection: *Identifying Vendors Aligned with Sustainable Purchasing Priorities*

Developed by Kaiser Permanente

Introduction

The Sustainable Food Scorecard was developed by Kaiser Permanente for use in any food related contract. This tool is used to gather information from potential vendors regarding distribution and corporate practices related to sustainable food. Its intent is to help hospital food service identify vendors that can support meeting sustainable purchasing goals as part of the broader RFP process and includes questions outside of sustainability such as preferred product availability, cost, and service. Vendors provide the requested information and hospitals score their responses, ultimately taking these scores into account for final vendor selection.

In the scorecard we ask vendors to respond to questions regarding their corporate and distribution practices, and to provide detailed line item lists of every product they can provide which meets our company's sustainable food criteria. Distribution practice questions seek to gather information on the ability to identify products by sustainability criteria for food and non-food product categories, as well as, the ability of a company to track and report on sustainable purchases. Corporate practice questions gather information on a company's internal sustainability policies and practices that reduce their environmental impact. For each product category, potential vendors are asked to list products they carry that meet specific sustainability criteria.

Instructions for Use

- 1) Make sure the document worksheets are protected before sending to potential vendors.
 - a. Each worksheet is protected individually, and will require using the code to modify the cells. The purpose of protecting the worksheets in the document is to maintain the integrity of the formulas and to ensure that each potential vendor provides data in a consistent/standard format. If you need to unprotect any of the worksheets to modify before sending to vendors, the code to unprotect is **sust** (go to Review menu, select Unprotect Sheet). Remember to protect each edited page of the document before sending to potential vendors.
- 2) Determine how you want to score responses. Some suggestions include:
 - a. Give each response the same weight and add up total scores for each worksheet (Corporate Practices, Distributor Practices, and each food and non-food category). The highest scoring vendor may be able to best meet your purchasing goals.
 - b. Give more "weight" to certain criteria based on your organizational policies and purchasing priorities. Examples include:
 - i. Responses to product category questions may have higher point values than responses related to general corporate practices.
 - ii. "No" responses to some questions may eliminate a potential vendor from consideration, such the ability for potential vendor to track and report on sustainable spend.
 - c. You may want to highlight/indicate to potential vendors which questions are the highest priority/imperative for your organization, and which are "go"/"no go."
- 3) This scorecard will included as part of the RFP Packet. Include language in RFP that references both sustainable purchasing goals and priorities and the inclusion of the scorecard. For example: *Our health care facility has a strong commitment to promote the public and environmental health of the communities we serve. It is our goal to support that commitment through purchasing food that has been produced using environmentally sound, socially responsible, and economically viable methods. Please complete the attached Sustainable Food Scorecard as part of responding to this RFP.*
- 4) Present the items below to Potential Vendors as part of an RFP Packet which includes:
 - a. **Cover/introduction letter** to potential vendor
 - b. **The Scorecard** (with cells protected; code to unprotect is: **sust**)

- c. **Sample letter** that vendors can use to gather the needed information from their manufacturers/suppliers
 - d. **Sustainable food purchasing criteria code list** for manufacturers to use in identifying products that meet sustainability criteria (also included in sample manufacturer letter)
- 5) Meet with potential vendors to explain the scorecard and how to complete it. Kaiser Permanente has found that this greatly increases the quality of the information provided by potential vendors. After initial RFP responses are submitted by potential vendors, additional meetings may be necessary to ensure that scorecard responses are complete and accurate.
 - 6) Receive vendor information and analyze responses to inform vendor selection process.

A Case Study of Use – The Kaiser Permanente Experience

Procurement Policy and Supply Chain Engagement at Kaiser Permanente

Kaiser Permanente recently developed a Sustainable Food Scorecard to use in evaluating potential food and food service vendors' ability to support its sustainable food purchasing initiatives. The scorecard has been an instrumental tool in the contracting process, providing Kaiser Permanente with: insight into potential vendors' corporate and distribution practices, and thus, their commitment to sustainability; detailed lists of the types of products they offer by product category and how they meet Kaiser Permanente's Sustainable Food Criteria (which align with the Green Guide for Health Care Food Service Credits); and a commitment from potential vendors to track and report on Kaiser Permanente's sustainable spend.

The scorecard is included in all food-related Requests for Proposal (RFPs) sent to potential vendors. Potential vendors are scored based on their corporate and distribution practices, the selection of products they offer which meet Kaiser Permanente's Sustainable Food Criteria and their ability to track and report on the organization's sustainable spend. These scores are then used in the vendor selection process. Responses to the Sustainable Food Scorecard are one piece of the vendor selection process, which also includes an evaluation of vendor service, quality and assurance of products, cost, and other factors.

The Sustainable Food Scorecard is setting sustainable food standards within the industry. As distributors are exposed to this type of tool and sustainability criteria, the industry begins to adapt to meet their customer needs, and access to and tracking of sustainable food becomes more readily available. Used by the Kaiser Permanente in 2011, the scorecard helped them identify a distributor that was willing to work with the health care system to identify sustainable products, track their spending and ultimately support their sustainable food service purchasing. The scorecard has been an essential tool for Kaiser Permanente in partnering with group purchasing organizations (GPOs) and distributors to clarify a shared vision of sustainability and objectives in realizing it.

Kaiser Permanente's use of the Sustainable Food Scorecard enabled the organization to select a vendor that could meet their needs in terms of sustainable, and has allowed the organization to maintain and exceed the level of sustainable food spend in their transition to a new vendor. The new vendors selected using the scorecard are collaborating with Kaiser Permanente to identify and target key high-volume food purchases to convert to sustainable. The use of the scorecard with GPOs and distributors is having a ripple effect within the industry, as these companies have begun using the scorecard in their own RFPs and contracts.

The Sustainable Food Scorecard and accompanying resources were developed by Kathleen M. Reed of Kaiser Permanente, with support from Health Care Without Harm, with contributions from Marie Kulick, Gretchen Miller, and Emma Sirois. Contact: Kathleen.M.Reed@kp.org with questions.

Sustainability Criteria Guide

Use the following criteria and related codes to identify sustainable products in product report.

Criteria Code	Sustainability Criteria by Product Category	Criteria apply to these food items only.
MEAT, DAIRY, POULTRY, EGGS		
A	Local (grown/ raised <u>and</u> processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.
B	Raised without antibiotics/no antibiotics administered	Beef, bison, lamb, pork, poultry, eggs, dairy
C	Certified Humane Raised and Handled	Beef, bison, lamb, pork, poultry, eggs, dairy.
D	Animal Welfare Approved	Beef & dairy cattle, bison, lamb, pork, poultry (chickens, turkeys, ducks and geese), sheep, goats.
E	rBGH/rBST-free	Dairy.
F	100% Grass Fed	Beef, bison, lamb, dairy.
G	American Grass Fed	Beef, bison, goat, lamb and sheep.
H	Raised without added hormones/no hormones added	Beef, bison, lamb.
I	USDA Certified Organic	Beef, bison, lamb, pork, poultry, eggs, dairy.
J	Food Alliance Certified	Beef, bison, lamb, pork, poultry, eggs, dairy.
K	Salmon Safe	Beef, bison, lamb, dairy, eggs.
SEAFOOD		
A	Local (grown/ raised <u>and</u> processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.
L	Clean Fish	Seafood - wild caught, seafood-farmed.
M	Wild or Farmed	All seafood.
N	Monterey Bay Aquarium (MBA) ranking (must be "Super Green," Health "Best Choice," "Best," or "Good" ranking)	Seafood - wild caught, seafood-farmed.
O	Certified by Marine Stewardship Council (MSC) <u>and</u> Low in Mercury	Seafood - wild caught.
P	Certified by Marine Stewardship Council (MSC)	Seafood - wild caught.
Q	Farm/Fishery Certification Status	Seafood - wild caught, seafood-farmed.
OTHER FOODS		
A	Local (grown/ raised <u>and</u> processed within a 250-mile radius of facility)	Any food item. For processed item, <u>at least 50% of ingredients</u> must be grown/produced locally.

R	Local (grown/ raised <u>and</u> processed within a 250-mile radius of facility) AND produced on a small-to medium-scale farm*	Fruits and vegetables.
S	Fair Trade Certified	Grains-flours-pasta, fruits, vegetables, coffee, tea, sugar, chocolate, cocoa, nuts.
T	Rainforest Alliance Certified	Fruits, coffee, tea, juice, chocolate, cocoa.
U	Non-GMO Project Verified	Corn, soy, canola, sugar beets, squash or papaya, and processed foods that contain corn, soy, canola, sugar beets, squash or papaya, and any of their derivatives. <i>(Note: List may expand as other GMO products are developed.)</i>
I	USDA Certified Organic	Vegetables, fruit, grains/legumes, coffee/tea, fruit juice, sugar, nuts, oils, wine, processed items.
J	Food Alliance Certified	Vegetables, fruit, grains/legumes, coffee/tea, nuts, oils, processed foods.
K	Salmon Safe	Fruits, vegetables, wine.
V	Bird Friendly	Coffee.
DISPOSABLE FOOD AND NON-FOOD SERVICE WARE		
W	Environmental Choice-EcoLogo Certified-Green Seal Certified	Disposable food or non-food service ware, e.g., napkins, paper towels, kitchen towels, tray liners, coated and uncoated paper, paper products used in food preparation, other.
X	Contains 100% Biobased Coatings	Disposable food service ware.
Y	Certified by USDA to Contain 95 percent or greater biobased content	Disposable food or non-food service ware.
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DD	No Chemicals of High Concern Intentionally Added to Product	Disposable food or non-food service ware.
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<p>*Definition: Small- to medium-scale farms tend to be run by family farmers who have a vested interest in their communities and are more likely to use sustainable farming techniques to protect natural resources and human health. They are an important part of the rural economy, preserve green space with the community, and serve as responsible stewards of the land.</p>		

Definition of small- to medium-sized farms can be based on size and/or income:

a) Size = under 300 acres (used by California Alliance with Family Farmers)

- Small: 1-50 acres
- Medium: 50-300 acres

b) Income (based on USDA definition of small- and medium-sized farms)

- Small: Less than \$250K revenue
- Medium: Up to \$1M revenue