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| **Vended meals procurement review** **CHECKLIST** |

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| **Procurement Review – Small Purchase**(Purchase costing less than $250,000 or more) – If awarded contract has a value great than $250,000 or the SFA’s small purchase threshold use the appropriate formal procurement review checklist (IFB or RFP) |
| SFA’s Small Purchases Threshold: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| SFA Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Agency Code: \_\_\_\_\_\_\_\_\_\_\_\_\_Vendor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Request the following documentation:* Copy of signed Vended Meals Agreement
* Copy of 3 invoices from vendor (April, May, and June of review year)
* Copy of Procurement Manual
* Written confirmation no other purchases were made outside the Joint Agreement
* Request the following documentation:
	+ solicitation documents
	+ specifications
	+ evaluation criteria
	+ contract and contract terms (if applicable)
	+ purchase orders
	+ any other documentation needed to evaluate performance such as invoices, receipts, etc.
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| **DPI Procurement review questions** |
|  | **Circle One** |
| 1. Did the SFA provide copy of completed Procurement Review form?
 | Yes | No -Finding |
| 1. Did the SFA provide a copy of its Procurement Policies and Procedures?
 | Yes | No -Finding |
| 1. Did the SFA provide copies of procurement documentation?
 | Yes | No -Finding |
| 1. Did the SFA provide reviewer with a signed Vended Meals Agreement?
 | Yes | No -Finding |
| * If yes, did the signed Vended Meal Agreement match what was on file at DPI?
 | Yes | No -Finding |
| 1. Did the SFA use the required template Vended Meals Agreement to purchase meals?
 | Yes | No -Finding |
| 1. Were three invoices/receipts received for review? (April, May, and June of review year)
 | Yes | No -Finding |
| 1. Does a review of three invoices/receipts show the SFA purchased the products and services described in the Vended Meals Agreement?
 | Yes | No -Finding |
| 1. Did invoice meal charges match those listed in the Vended Meals Agreement?
 | Yes | No |
| * Were any modifications listed on the attachment for modifications to the Vended Meals Agreement?
 | Yes | No |
| * + If yes, were modifications allowable (any issues)?
 | N/A | Yes | No -Finding |
| 1. Was amendment for USDA Foods complete and signed?
 | Yes | No  |
| * If yes, was entitlement passed through to SFA in the form of credit on the monthly invoice and end of year reconciliation of USDA Foods entitlement amount?
 | N/A | Yes | No -Finding |

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| **Solicitation** |
|  | **Circle One** |
| 1. Did SFA provide written confirmation no other purchases outside the Vended Meals Agreement where made during the school year (ex: equipment or cleaning supplies)?
 | Yes | No  |
| * If No, was this procurement(s) in compliance with the requirements for the appropriate threshold? (Federal, State, and Local)

Note: Use appropriate checklist to review purchase(s).List Purchase(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | N/A | Yes | No -Finding |
| 1. If the State agency requires the use of a prototype document for obtaining quotes to ensure competition is achieved and documented, did the SFA use the prototype?

(example vended meal bid – not required) | N/A | N/A |
| 1. Were price or rate quotations obtained from an adequate number (2 or more) of qualified sources?
 | Yes | No -Finding |
| 1. Did the SFA restrict competition by:
 |
| * Placing unreasonable requirements on firms to qualify for business?
 | Yes -Finding | No  |
| * Requiring unnecessary experience or excessive bonding?
 | Yes -Finding | No  |
| * Specifying a “brand name” product, not allowing “an equal” product to be offered?
 | Yes -Finding | No  |
| 1. Were clear and accurate descriptions of the technical requirements provided for the product, or service being procured?
 | Yes | No -Finding |
| 1. Did the solicitation include a requirement that goods must be produced and processed in the United States ("Buy American")?
 | Yes | No -Finding |
| **EVALUATION AND AWARD PROCESS FOR SMALL PURCHASE PROCEDURES** |
|  | **Circle One** |
| 1. Did the SFA maintain records sufficient to detail the significant history of the procurement?
 | Yes | No -Finding |
| 1. Was the correct vendor selected based on the products/services requested and the vendor responses provided?
 | Yes | No -Finding |
| **CONTRACT MANAGEMENT FOR SMALL PURCHASE PROCEDURES**  |
|  | **Circle One** |
| 1. Obtain three invoices/receipts for review
 | Yes | No -Finding |
| 1. Does a review of three invoices/receipts show that the SFA purchased the products they solicited from the vendor?
 | Yes | No -Finding |
| ADDITIONAL COMMENTS: |