|  |
| --- |
| **Small Purchase CHECKLIST** |
|  |
| **Procurement Review – Small Purchase**(Purchase costing less than $250,000 or less than SFA’s small purchasing threshold) |
| SFA - Small Purchases Threshold: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Vendor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Request the following documentation:* Solicitation documents with Terms and Conditions, Product Specifications, and Quantities
* Evaluation criteria (Evaluation Matrix or Evaluation Summary is acceptable)
* Awarded Contract (if applicable – RFP or Bid could become the awarded contract)
* Purchase orders (if applicable)
* Three (3) invoices from vendor (one from each month April, May, and June)
 |
| **Solicitation** |
|  | **Circle One** |
| 1. Did the SFA provide copy of completed Procurement Review form?
 | Yes | No -Finding |
| 1. Did the SFA confirm that a procurement process took place?
 | Yes | No -Finding |
| 1. Was this procurement in compliance with the requirements for the appropriate threshold? (Federal, State, and Local)
 | 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 agreement) | N/A | Yes | No -Finding |
| 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 procurement include all requirements regarding "Buy American?
 | N/A | 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 |
| 1. The need for documentation that requests consideration on the use of domestic alternative foods before approving an exception
 | Yes | No -Finding |
| 1. A requirement to document the use of a non-domestic food exception when competition reveals the cost of domestic food is significantly higher than non-domestic food?
 | Yes | No -Finding |
| 1. A requirement to document the use of a non-domestic alternative food due to the domestic food not produced or manufactured in sufficient and reasonable available quantities of a satisfactory quality?
 | Yes | No -Finding |
| **Solicitation - USDA Foods End Products**(*Skip this section if no direct diversion end products listed PR Form – Mark N/A*) | N/A |
|  | **Circle One** |
| 1. Did the SFA include the following in its solicitation:
 |
| 1. A provision for information in bid/response for food recalls procedures?

NOTE: *Responding to a Food Recall - Procedures for Recalls of USDA Foods* | Yes | No -Finding |
| 1. Contact information for a point and backup person for handling food recalls?

NOTE: *Responding to a Food Recall - Procedures for Recalls of USDA Foods* | Yes | No -Finding |
| 1. Did the SFA solicit for and receive USDA foods processed end products approved by the SDA?

NOTE: *SDAs approve the items available for sale in their State on the processor's SEPDS. Some States make the SEPDS available to the SFA.*  | Completed at the state level |
| Evaluation and Contract Award - USDA Foods End Products |
| 1. Did the supplier provide information for how food recalls will be handled?

NOTE: *FDD Policy: Responding to a Food Recall - Procedures for Recalls of USDA Foods* | Yes | No -Finding |
| 1. Does the value pass-through method identified in the contract match what was included in the solicitation?
 | Yes | No -Finding |
| Contract Performance Management Process - USDA Foods End Products |
| 1. Did the SFA receive the value of USDA foods as stated on the State-approved Summary End Product Data Schedule (SEPDS)?

Note: SFA MUST COMPLETE *USDA FOODS PROCESSING FORM* FOR THIS QUESTION  | Yes | No |
| If no, did the SFA pursue the difference with the processor and come to a reasonable conclusion or work with the State Distributing Agency to reconcile the difference?  | N/A | Yes | No -Finding |
| 1. Is the SFA accepting and efficiently using large quantities of USDA Foods as may be offered as a donation by USDA?
 | Yes | No -Finding |
| ADDITIONAL COMMENTS: |
| **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?
 | N/A | Yes | No -Finding |
| **CONTRACT MANAGEMENT FOR SMALL PURCHASE PROCEDURES**  |
|  | **Circle One** |
| 1. Obtain three invoices/receipts for review
 | Yes | No -Finding |
| If yes, does a review of three invoices/receipts show that the SFA purchased the products they solicited from the vendor? | Yes | No -Finding |
| ADDITIONAL COMMENTS: |