

VENDED MEALS PROCUREMENT REVIEW CHECKLIST

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.

DPI PROCUREMENT REVIEW QUESTIONS

		Circle One	
1) Did the SFA provide copy of completed Procurement Review form?		Yes	No - Finding
2) Did the SFA provide a copy of its Procurement Policies and Procedures?		Yes	No - Finding
3) Did the SFA provide copies of procurement documentation?		Yes	No - Finding
4) 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
5) Did the SFA use the required template Vended Meals Agreement to purchase meals?		Yes	No - Finding
6) Were three invoices/receipts received for review? (April, May, and June of review year)		Yes	No - Finding
7) Does a review of three invoices/receipts show the SFA purchased the products and services described in the Vended Meals Agreement?		Yes	No - Finding
8) 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
9) 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

SOLICITATION		
	Circle One	
10) Did SFA provide written confirmation no other purchases outside the Vended Meals Agreement were made during the school year (ex: equipment or cleaning supplies)?	Yes	No
<ul style="list-style-type: none"> 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
11) 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
12) Were price or rate quotations obtained from an adequate number (2 or more) of qualified sources?	Yes	No - Finding
13) Did the SFA restrict competition by:		
<ul style="list-style-type: none"> Placing unreasonable requirements on firms to qualify for business? 	Yes - Finding	No
<ul style="list-style-type: none"> Requiring unnecessary experience or excessive bonding? 	Yes - Finding	No
<ul style="list-style-type: none"> Specifying a "brand name" product, not allowing "an equal" product to be offered? 	Yes - Finding	No
14) Were clear and accurate descriptions of the technical requirements provided for the product, or service being procured?	Yes	No - Finding
15) 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
2) 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
2) Does a review of three invoices/receipts show that the SFA purchased the products they solicited from the vendor?	Yes	No - Finding
ADDITIONAL COMMENTS:		