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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. | | | |
| **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: | | | |