

School Food Authority

Procurement Checklist

Use this checklist when preparing solicitation documents, conducting informal and formal procurements, evaluating bids and proposals and executing contracts that involve the use of School Nutrition Funds.

<p>Procurement Plan:</p>	<p><input type="checkbox"/> Written procurement plan</p> <p><input type="checkbox"/> Authorized purchaser(s) specified</p> <p><input type="checkbox"/> Detailed procurement methods to be used (quotes, IFB, RFP, micro purchasing, non-competitive negotiation) including detailed procedures for each purchasing method</p> <p><input type="checkbox"/> Award method clearly described (i.e., line item, bottom line)</p> <p><input type="checkbox"/> Advertisement procedures</p> <p><input type="checkbox"/> Vendor notification notified of award/non-award of contract</p> <p><input type="checkbox"/> Code of ethics/conflict of interest policy</p> <p><input type="checkbox"/> Other State/local requirements</p>
<p>Procurement Procedures:</p>	<p><input type="checkbox"/> Letter of invitation</p> <p><input type="checkbox"/> Intent of procurement activity</p> <p><input type="checkbox"/> Contract time period</p> <p><input type="checkbox"/> Bid/proposal/quote submission procedures (i.e. sealed bid, written, etc.)</p> <p><input type="checkbox"/> Pre-bid/proposal meeting date/time/location (if applicable)</p> <p><input type="checkbox"/> Bid opening date/time/location; Proposal opening procedures</p> <p><input type="checkbox"/> Contact information</p> <p><input type="checkbox"/> Civil Rights Statement</p> <p><input type="checkbox"/> Other State/local requirements</p>
<p>Terms and Conditions:</p>	<p><input type="checkbox"/> Certification regarding disclosure of lobbying (\$100,000+)</p> <p><input type="checkbox"/> Debarment/suspension certification form (\$25,000+)</p> <p><input type="checkbox"/> Non-collusion statement</p> <p><input type="checkbox"/> Assurance of ethical practices</p> <p><input type="checkbox"/> Escalation/de-escalation clause</p> <p><input type="checkbox"/> Price determination statement (fixed, fixed with firm price for delivery, etc.)</p> <p><input type="checkbox"/> Contract Extension or “roll-over” clause if warranted</p> <p><input type="checkbox"/> Buy American statement and instructions</p> <p><input type="checkbox"/> Bid/proposal protest procedures</p> <p><input type="checkbox"/> Remedy for non-performance/termination of contract</p> <p><input type="checkbox"/> HUB statement to involve minority business where possible</p> <p><input type="checkbox"/> “Equal Employment Opportunity” compliance statement (\$10,000+)</p> <p><input type="checkbox"/> Energy Policy and Conservation Act statement</p> <p><input type="checkbox"/> Clean Air/Water Act statement (\$100,000+)</p> <p><input type="checkbox"/> Civil Rights Act statement</p> <p><input type="checkbox"/> Jessica Lunsford Act requirements</p> <p><input type="checkbox"/> Return of Discounts, Credits and Rebates to SFA statement</p> <p><input type="checkbox"/> Record retention and record access requirements (records maintained for three years from final payment of contract and/or renewal; all base solicitations must be maintained for three years after the final payment on the contract)</p>

<i>(Terms and Conditions cont.)</i>	<input type="checkbox"/> Method of shipment/delivery requirements <input type="checkbox"/> Method of payment, invoices, statements, etc. <input type="checkbox"/> Purchase instrument to be used and how vendor will receive purchase orders <input type="checkbox"/> Compliance with Jessica Lunsford Act <input type="checkbox"/> Bid certification form <input type="checkbox"/> Other State or local requirements <input type="checkbox"/> Specifications that are sufficiently detailed to get what is needed but not so specific as to restrict competition <input type="checkbox"/> Product specifications (approved brand and/or equivalent) <input type="checkbox"/> Quantity <input type="checkbox"/> Quality <input type="checkbox"/> Packaging <input type="checkbox"/> Pricing (unit and extended) <input type="checkbox"/> Procedure for documenting/pre-approving any substitutions and/or deviations <input type="checkbox"/> Other State/local requirements
Documentation and Records:	<input type="checkbox"/> All IFBs/RFPs/RFQs with appropriate documentation and signatures of authorized purchasers maintained on the original solicitations <input type="checkbox"/> Comparison charts and to document procurement decisions and contract awards <input type="checkbox"/> Record of public bid openings and/or proposal openings if proposals will be publicly opened <input type="checkbox"/> Copies of contract award/non-award letters <input type="checkbox"/> Copies of advertisements for solicitation of good/services <input type="checkbox"/> Determination/document of correct procurement method used <input type="checkbox"/> Evaluation of escalation/de-escalation clause <input type="checkbox"/> Evaluation of Contract Extension/Amendment (roll-over clause) <input type="checkbox"/> Evaluation/documentation of contract re-negotiations/changes to original contract at the timelines and under the same conditions specified in the original solicitation document <input type="checkbox"/> Evaluation of return of discounts, credits and rebates (as applicable) and detailed procedure indicating how/when the discounts, rebates and credits would be assigned to the SFA by the contractor <input type="checkbox"/> Evaluation of whether procurement methods/activities are consistent with the SFA's approved written procurement plan where/how all documents pertaining to the solicitation and contract/contract amendments will be maintained <input type="checkbox"/> Non-competitive purchases (sole source, emergency, etc.) are appropriately documented and have received approval from State agency or governing board prior to award, including purchases through means of <i>piggybacking</i> onto another SFA's solicitation document <input type="checkbox"/> Invoices/payments for items purchased with school nutrition funds <input type="checkbox"/> Documentation of any contractor performance or breach of contract from vendors <input type="checkbox"/> Other State/local requirements

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- 1) mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
 - 2) fax: (202) 690-7442; or
 - 3) Email: program.intake@usda.gov.
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