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| **Small Purchase CHECKLIST** | | | |
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| **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: | | | |