***This document is a sample and is not intended to be all inclusive. The School Food Authority is ultimately responsible to ensure that the plan complies with all Federal Regulations, State Procurement Code and Regulations and local procurement policies.***

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of School Food Authority

**PROCUREMENT PLAN**

**CHILD NUTRITION PROGRAMS**

This procurement plan contained on the following pages \_\_\_\_\_\_\_ through \_\_\_\_\_\_\_\_ will be implemented on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ from that date forward until amended. All procurements must adhere to free and open competition. Source documentation must be available to determine open competition, the reasonableness, the allowability and the allocation of costs.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Chairman, Board of Education Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Superintendent of Schools Date

(Rev. 02-11-20)

**(Name of School Food Authority)**

**PROCUREMENT PLAN**

1. The (Name of School Food Authority) plan for procuring items for use in the Child Nutrition Program is as follows. The procurement plan provides for free and open competition, transparency in transactions, comparability, and documentation of all procurement activities.
2. If the amount of purchases is more than the Federal small purchase threshold currently valued at $250,000, or State agency $75,000 or SFA approved threshold if less, formal procurement procedures will be used as required by 2 CFR Part 200.318-326, formerly 7 CFR **§**3016.36. Informal procurement procedures (small purchase) will be required for purchases under the most restrictive small purchase threshold.
3. If the amount of purchases for items is less than the district’s small purchase threshold, the following, **SMALL PURCHASE PROCEDURES, including quotes,** will be used. Quotes from an adequate number of qualified sources will be required.
4. Written Specifications will be prepared and provided to the vendor.

1. Each vendor will be contacted and given an opportunity to provide a price quote on the same specifications. A minimum of two vendors shall be contacted.
2. The (Title of person/position) will be responsible for contacting potential vendors when price quotes are needed.
3. The price quotes will receive appropriate confidentiality before award.
4. Quotes will be awarded by (Title of person/position). Quotes awarded will be to the lowest and best quote based upon quality, service availability, price, and/or \_\_\_\_\_\_\_\_\_.
5. The (Title of person/position) will be responsible for documentation of records to show selection of vendor, reasons for selection, names of all vendors contacted, price quotes from each vendor, and ***written specifications.***
6. The (Title of Person) will be responsible for documentation that the actual product specified is received.
7. Any time an accepted item is not available, the ( Title of person/position) will select the acceptable alternate. Full documentation will be made available as to the selection of the acceptable item.
8. Bids will be awarded on the following criteria:
9. *Price*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Ex.: quality, delivery, service, etc.)
10. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
11. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
12. The (Title of person/position) is required to sign all quote tabulations, signifying a review and approval of the selections.
13. If the amount of purchases is more than the Federal micro purchase threshold currently valued at $10,000, or the State valued at $20,000 (whichever is stricter) small purchase procedures will be used as required by 2 CFR Part 200.318-326, formerly 7 CFR §3016.36. Micro purchase procedures will be allowed for purchases under the most restrictive micro purchase threshold. It is $10,000, but this threshold is periodically adjusted for inflation. The micro-purchase threshold is set by the Federal Acquisition Regulation at 48 CFR Subpart 2.1 (Definitions).
14. Micro-purchase procedures comprise a subset of a non-Federal entity's small purchase procedures. The non-Federal entity uses such procedures in order to expedite the completion of its lowest-dollar small purchase transactions and minimize the associated administrative burden and cost.
15. **Competition:** Purchases within the micro-purchase threshold can be awarded without soliciting competitive price quotations as long as the price is reasonable.
16. **Purchases**: To the extent practicable, purchases must be distributed equitably among qualified suppliers. Price comparisons are not required, but the price(s) should be considered reasonable.
17. This distribution of purchases among qualified suppliers can happen in one of two ways; as a single purchase or over several purchases. For example, a school procuring apples may purchase:
18. **Reasonable Price**: To verify the reasonableness of a price, the organization could compare previous purchases, have personal knowledge of the item being purchased, and/or compare to similar items being purchased.
19. **Records**: Documentation must be kept for all purchases regardless of the procurement method used, including micro-purchases. Best practice: Maintain all micro-purchase documentation in one file.
20. The following procedures will be used for all other purchases:

* Competitive Sealed Bids
* Competitive Negotiation
* Noncompetitive Negotiation

Miscellaneous Provisions:

1. The School Food Authority agrees that the reviewing official of each transaction will be the (Title of person/position).

1. Payment will be made to the vendor when the contract has been met and verified and has met the SFA’s procedures for payment. (If prompt payment is made, discounts, etc. are accepted.)
2. Specifications will be updated as need.

1. If product is not as specified, the following procedure will take place:

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The following conduct will be expected of all persons who are engaged in the awarding and administration of contracts supported by School Food and Nutrition Program Funds. These written standards of conduct include:

1. No employee, officer or agent of the (School Food Authority) shall participate in the selection or in the award or administration of a contract supported by program funds if a conflict of interest, real or apparent, would be involved.

Conflicts of interest arise when one of the following has a financial or other interest in the firm selected for the award:

1. The employee, officer or agent;
2. Any member of the immediate family;
3. His or her partner;
4. An organization which employs or is about to employ one of the above.
5. The (School Food Authority) employees, officers oragents shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, potential contractors, or parties to sub-agreements.
6. Penalties for violation of the standards of code of conduct of the (School Food Authority) School Child Nutrition Program should be:
7. Reprimand by Board of Education;
8. Dismissal by Board of Education;
9. Any legal action necessary.

CODE OF CONDUCT

The following conduct will be expected of all persons who are engaged in the award and administration of contracts supported by school food and nutrition programs funds.

1. No employee, officer, or agent of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (SFA) shall participate in the selection of or in the award or administration of a contract supported by program funds if a conflict of interest, real or apparent, would be involved.
2. Conflicts of interest arise when any of the following has a financial or other interest in the firm selected for the award:
3. The employee, officer, or agent
4. Any member of his/her immediate family
5. His or her partner
6. An organization that employs, or is about to employ, any of the above

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(SFA’s) officers, employees, or agents shall neither

solicit nor accept gratuities, favors, or anything of material and/or monetary value from contractors, potential contractors, or parties to sub agreements. The school district may set minimum rules where the financial interest is not substantial or the gift is an unsolicited item of nominal intrinsic value.

The removal of any food, supplies, equipment, or school property, such as official records, recipe books, and the like, is prohibited.

The outside sale of such items as used oil, empty cans, and the like will be sold by contract between the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(SFA) and the outside agency. Individual sales by any school person to an outside agency or other school person is prohibited.

Failure of any employee to abide by the above-stated code could result in a fine or suspension, or both, or dismissal. Interpretation of the code will be given at any time by contacting \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(title of person) (telephone number)

The\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ will not be responsible for any other explanation

(SFA)

or interpretation that anyone presumes to make on behalf of the School Board.

This plan adopted by the School Board of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(School Food Authority)

at the regularly scheduled meeting on this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ dd/mm/yy

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Superintendent Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Secretary of the Board Date

CHART OF PROCEDURES

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_School District will purchase the following products

or group of products and services as per the stated purchase period using the identified procurement method. Price quote time frame period is defined as the time frame for which bids or quotes are obtained and awarded.

|  |  |  |
| --- | --- | --- |
| PRODUCT | PRICE QUOTE TIME FRAME | PROCUREMENT METHOD USED |
| Milk |  |  |
| Bread |  |  |
| Canned fruits |  |  |
| Canned vegetables |  |  |
| Frozen fruits |  |  |
| Frozen vegetables |  |  |
| Prepared fruits and vegetables |  |  |
| Fresh fruits |  |  |
| Fresh vegetables |  |  |
| Meats |  |  |
| Paper products |  |  |
| Chemicals |  |  |
| Small equipment |  |  |
| Large equipment |  |  |
|  |  |  |
|  |  |  |

**Sample Request for Quotation**

**Insert Letterhead**

Subject: Request for Quotation

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name of sales rep

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name of SFA

Fax No: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

From: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name of Personnel

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name of SFA

Deadline for submission: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dear Sales Rep:

Our school is requesting products for the school food service program. Attached is a list of items and the specifications of those items.

To comply with federal standards, we request that all products are American made processed products to the maximum extent practicable.

We are also requesting that processed entrée items be CN labeled or have product formulation sheets that demonstrate compliance for meat and whole grain rich products as required by USDA Child Nutrition Programs.

Please submit all quotes not later than \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_date for consideration. You may fax the quotes to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or mail to the below address:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name of contact person

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Address

If you have any questions, please call \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Example of Product Request Sheet**

|  |  |  |  |
| --- | --- | --- | --- |
| Item Specification | CN or formulation statement required | Quantity  (Aggregate) | Delivery or special requests |
| Bosco Pizza Bread | yes | 2 cases |  |
| Beef, ground, fresh, no more than 26% | no (in FBG) |  |  |
| Beef patties, 2 oz. Tyson or like products | yes | 5 cases |  |
| Pork sausage, frozen | no (in FBG) | 1 1b. |  |
| Chili Con Carne with beans | no (in FBG) | 5 cases |  |
| Chili with beans | Yes (in FBG) | 64 oz |  |
| Milk 1% white | no | 10 cases |  |
| Whole wheat bread, 1 oz-slice | no |  | weekly |
| Green beans canned | no | 5 cases | 1st ingredient whole wheat |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**School** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**year** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Vendor contacts**

**This form is to be used to document vendors response.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name, Address, Telephone number of vendor** | **name of person contacted** | **date of contact** | **type of contact**  **(letter, Phone, Personal)** | **response received** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**purchase documentation sheet**

use this sheet to total prices for each potential vendor in order to select the vendor with the **lowest prices**. justification for not purchasing products with the lowest price must be provided.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Date** | **Item specification** | **vendor 1** | **price** | **vendor 2** | **price** | **vendor 3** | **price** | **vendor selected** | **comments** |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |