

## Business Operations

### Procurement Plan – School Food Authorities

The following procurement policy statement shall govern all purchasing activities that relate to any aspect of the National School Lunch and Breakfast Programs. This statement is meant to provide guidance to our personnel and vendors on acceptable and/or required procurement practices. Our goal is to fully implement all required and recommended procurement rules, regulations and policies set forth in 2 CFR 200, 7 CFR parts 210, 3016, and 3019, and by the State Agency.

### Procurement Policy

The purchasing procedure to be followed shall be determined by the anticipated total annual expenditure on items related to the food service program:

- a. When the annual total for food service program related items is less than \$250,000 (~~small-purchase simplified acquisition~~ threshold) per procurement event or in aggregate purchases, this organization will follow the informal ~~small-purchase simplified acquisition~~ procedures.
- b. When the annual total for food service program related items is greater than \$250,000 (~~small-purchase simplified acquisition~~ threshold) per year per procurement event or in aggregate purchases, this organization will follow the Formal Competitive Solicitation Procedures.

#### 1. Micro-Purchase Procedures

Micro-purchases may be used for single purchases under \$10,000 made with a vendor. Prices will be reviewed for reasonableness. Purchases will be spread equitably among all qualified sources.

#### 2. ~~Small Purchase Simplified Acquisition Threshold~~ Procedures

For purchases made below the ~~small-purchase simplified acquisition~~ threshold, ~~small purchase simplified acquisition~~ procedures will be utilized to purchase necessary goods and services. When ~~small-purchase simplified acquisition~~ procedures are used, this organization will take the following steps:

- a. Contact a reasonable number of qualified vendors;
- b. Write specifications for goods and services;
- c. Document each vendor's quoted price (ex. log sheet);
- d. Select the company that provides the lowest, most responsive, and responsible bid;
- e. Document supplier who was awarded the quote; and,
- f. Manage orders by confirming product and prices match quotes.

#### 3. Formal Competitive Solicitation Procedures

For purchases made in excess of the ~~small purchase~~ **simplified acquisition** threshold, a formal competitive solicitation will be conducted. When formal competitive solicitation procedures are used, this organization will take the following steps:

- a. Prepare an Invitation for Bid (“IFB”) or Request for Proposal (“RFP”) document specifically addressing the items to be procured:
  - i. Include detailed specifications; and,
  - ii. Ensure price will be most heavily weighted.
- b. Publicly announce and advertise the bid/proposal at least 21 calendar days prior to bid opening;
- c. Announcements will include the date, time, and location in which bids will be opened;
- d. Determine the most responsive and responsible bid/proposal by using the selection criteria set forth in the bid/proposal document:
  - i. Responsible bidders will be those whose bid/proposal conform to all of the terms, conditions and requirements of the IFB/RFP; and,
  - ii. Responsible bidders will be those who are capable of performing successfully under the terms and conditions of the contract.
- e. Award the contract:
  - i. To the most responsive and responsible bidder based on the criteria set forth in the IFB/RFP;
  - ii. At least two weeks before program operations begin; and,
  - iii. If a protest is received, it must be handled in accordance with 7 CFR 210.21.
- f. Retain all records pertaining to the formal competitive bid process for a period of five years plus the current year.

(Note: If the ~~small purchase~~ **simplified acquisition** threshold established in the sponsor’s procurement policy statement is less than \$250,000, the smaller bid threshold will govern.)

#### Procurement Summary

This organization incorporates the following elements into the Procurement Policy Statement, as required by 2 CFR 200 and 7 CFR parts 210, 3016, and 3019.

1. Competition

We shall demonstrate our goods and services are procured in an openly competitive manner. Competition will not be unreasonably restricted.

2. Comparability

We recognize for true competition to take place, we must maintain reasonable product specifications to adequately describe the products to be purchased and the volume of planned purchases based upon pre-planned menu cycles.

3. Documentation

We shall maintain for the current year and the preceding three years all significant materials that will serve to document our policies and procedures.

4. Code of Conduct: This program shall be governed by the attached Code of Conduct and it shall apply to all personnel, employees, directors, agents, officers, volunteers, or any person(s) acting in any capacity concerning the food service procurement program.
5. Contract Administration: Purchases shall be checked or verified by designated staff to assure that all goods and services are received and prices verified. All invoices and receipts shall be signed, dated, and maintained in the documentation file.
6. General Requirements:
  - a. Small, minority, **veteran-owned**, and women's businesses enterprises and labor surplus firms are used when possible.
  - b. Ensure compliance with the Buy American Provision when purchasing food.
  - c. A cost or price analysis in connection with every procurement action in excess of the **small-purchase simplified acquisition** threshold including contract modifications.
  - d. Documented procurement procedures and activities will be maintained.

Duties of Food Service:

1. Plan the goods or services needed for the school food service program for the school year based on planned menus through needs assessment, forecasting, and budgeting.
2. Develop written specifications for food/supplies needed. Include details such as descriptions and product requirements (e.g. packaging, weight, pack size, etc.) for needed goods or services.
3. Compare product specifications among all vendors/contractors. Information for prices obtained from grocery stores, farmer's markets, etc.
4. Make procurement awards based on the lowest and best vendor's response as determined by quality, availability, service, and price.
5. Place and confirm orders with vendors or make plans to purchase the required items.
6. To make procurement awards based on the lowest and best vendor's response as determined by quality, availability, service, and price.
7. To work with vendors on a fair and equal basis.
8. To conduct an in-house procurement review once per year.

Legal Reference: [2 CFR 200.318](#) through [2 CFP 200.321](#)  
[2 CFR 200.323](#)  
[7 CFR 210.21](#)

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