

School Nutrition Program Procurement Review Guidance for Sponsors

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Procurement Reviews are one of three required Compliance Reviews for School Nutrition Program Sponsors and are completed in the same cycle as Administrative and Resource Management Reviews (**School Year 2023-2024**). The following steps detail the process of a Procurement Review.

Best Practices and Helpful Hints

- Procurement Reviews will be conducted within the Grant Electronic Monitoring System/Michigan Administrative Review System (GEMS/MARS). You must log into GEMS/MARS through your MiLogin for Business Account.
- Maintain all Procurement documentation. Documents should be kept on file for three years plus the current year and longer if the contract terms are beyond that period.
- A Procurement Review Checklist is available as a reference for the review: [Procurement Review Checklist](#)
- If assistance is needed throughout a Procurement Review, contact your lead reviewer.

Scheduling and Notification

- Sponsors scheduled for a procurement review will receive a detailed scheduling email from GEMS/MARS.
- The emailed scheduling letter will include:
 1. Date and time of the entrance conference webinar
 2. GEMS/MARS access information
 3. Form and Questionnaire completion information
 4. List of required documents:
 - Procurement Procedures
 - Purchasing and Procurement Policies
 - Written Code of Conduct (if not included in the Procurement Procedure or Policy)
 - A Vendor Paid List/Summary of Total Expenditures by Vendor Report
This report should be available from whatever type of financial management software the sponsor is using. If the sponsor has no financial software, then there must be a list of all transactions.
 - **For Sponsors with Food Service Contracts only (All applicable to SY 2023/2024)**
 - ✓ Foodservice contract invoices
 - ✓ Foodservice contract operating statements for cost-reimbursable contracts
 - ✓ Reconciliations supporting your Planned Assistance Level (PAL) USDA Foods
 - ✓ Amendments or addenda to the original Food Service Management Company or Vended School Meals Company Contract
 - ✓ All other supporting documentation regarding the oversight and management of the food service contract
 5. Due dates
 6. Contact information

Entrance Conference Call

- The Entrance Conference Webinar is planned and conducted in Teams or within Zoom.
- The sponsors' staff members who are involved in the procurement and purchasing process should attend the Entrance Conference. This includes the sponsor's food service director, finance/business manager, cafeteria manager, assistants, or anyone else who assists in the National School Lunch Program (NSLP).
- The webinar may last up to an hour and will be recorded for future viewing.
- The webinar will provide guidance for sponsors who are scheduled for a Procurement Review.

Pre-Assessment Document Submission Form

- To access the Sponsors' Pre-Assessment Document Submission Form, log in to GEMS/MARS and select the task *"The Document Submission Process has been initiated for Sponsor Name the Pre-Assessment for Procurement Review and Resource Management Reviews (DRT) review. Please click here to go to Submit Documents"*.
- The Pre-Assessment forms collect information related to Resource Management and Procurement practices as well as supporting documentation. This information can be viewed by both MDE reviewers for the Procurement Review and Resource Management Review
- Sponsors will be expected to complete and upload all required documentation into the pre-assessment form by the listed due date on the scheduling letter.
- The required procurement review documents are listed below:

Financial Reports

- Upload Vendor Paid List or summary of total expenditures (Excel file)

Policies and Procedures

- Procurement policies (these may be located on the sponsor's website)
- Procurement procedures (instructions/manual for conducting procurement)
- Written code of conduct (also known as a conflict-of-interest document)

Training Documentation

- Annual procurement trainings completed (written confirmation of completion w/dates)

Food Service Contract Documentation

- 12 months of invoices (07/01/23 – 06/30/24)
- 12 months of operating statements (cost reimbursement)
- Reconciliations of PAL Reports (SY 2023/2024)
- Any amendments or addendums

- These documents are required for procurement and the procurement review. If you have any questions about the pre-assessment form or document uploads, email MDE-CNP-Procurement@michigan.gov to be connected to your lead reviewer.

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Self-Operated Sponsor Information (Questionnaire) Form

- The Sponsors' Procurement Review Information (Questionnaire) Form is also available in GEMS/MARS under the Procurement Review.
- Sponsors will be expected to complete the information (questionnaire) form by the listed due date on the scheduling letter and the pre-assessment form.
- Each section in the Information Form must be completed as applicable to your program. If questions arise, contact your lead reviewer.

Sponsor Information

1. How many people are responsible for procurement on behalf of the Sponsor's School Nutrition Department?
 - Enter the names, positions/titles, email addresses, and phone numbers of staff members who hold key procurement responsibilities. We expect to see staff members such as the business manager, food service director, assistant director, superintendent, and possibly building or kitchen leads or support staff if they are conducting major procurement activities.
 - List Procurement Duties: All procurement duties should be listed. The duties may include, purchasing, ordering, approvals, reviewing, etc.
2. Any comments related to this section can be entered within the comment box.

Sponsor Information

Sponsor Name:

Sponsor Number:

How many people are responsible for procurement on behalf of the Sponsor's School Nutrition Department?

Details for responsible parties:

Name	Position/Title	Email	Phone	List procurement duties
Sally Smith	Food Service Director	sally.smith@abcschools.net	517-333-3333	Ordering, purchasing...
Jim Walker	Business Manager	jim.walker@abcschools.net	517-333-3334	Approvals, procurement...

Comments

Annual Procurement Training Requirement

1. All staff responsible for procurement must participate in annual training. Select **Yes or No** to confirm this statement: Have all staff listed above with procurement-related responsibilities completed procurement training for the year of review, related to their specific role with procurement?
2. Training documentation must be uploaded in the pre-assessment form to verify the trainings completed and dates of completion for review.

Annual Procurement Training Requirement

All staff with responsibilities for procurement must participate in annual training

Have all staff listed above with procurement related responsibilities completed procurement training for the year of review, related to their specific role with procurement?

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

General Procurement

Micro & Small Purchase Threshold Information

1. Enter all threshold amounts for micro-purchases, and small purchases (for food, services, and supplies/materials). These amounts may be noted in a policy/procedure. School boards or local authorities can set thresholds lower than the Federal or State of Michigan requirements.
2. What consortium for USDA Foods was chosen for the review year, and what broadline distributor was used? Select the name of the consortium the district utilized for the school year: Macomb-Oakland-Wayne RESA (MOR), School Purchasing and Resource Consortium (SPARC), Great Lakes Consortium (GLC)
3. Enter the total paid amount to the distributor for USDA and commercial foods.
4. Any comments about group purchasing efforts can be entered within the comment box. For additional information, refer to the [USDA Foods Consortia](#) website.

General Procurement	
Micro & Small Purchase Threshold Information	
Enter the sponsors threshold amounts under each category. If using the State of MI thresholds, list the amounts in the categories.	
What is the Sponsor's Micro purchase threshold?	\$2,500
What is the Sponsor's small purchase threshold for Food?	\$100,000
What is the Sponsor's small purchase threshold for Services?	\$250,000
What is the Sponsor's small purchase threshold for Supplies, Materials, and Equipment?	\$25,000
What consortium for USDA Foods was chosen for the review year, and what broadline distributor was used?	GLC (Great Lakes Consortium) - Gordon Food Service
Total Paid to Distributor for USDA and Commercial Foods	\$474,020.31
Comments about General Procurement	
<input type="text"/>	

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Procurement Methods Used

For each procurement method listed, select the methods used within the school year with a **Yes or No** response. If yes, is selected, additional information is required in the form.

1. Group Purchasing Efforts
2. Market Basket Analysis
3. Micro-purchasing
4. Small/Informal Purchase
5. Formal Contracts: Sealed bids/competitive Proposals
6. Noncompetitive procurement

Procurement Methods Used

Were the following procurement methods used?

Group Purchasing Efforts (Consortia, CN Cooperative, Agent, Third-party)	<input type="text" value="Yes"/>
Market Basket Analysis for Evaluation of Contract Award	<input type="text" value="Yes"/>
Micro-Purchasing	<input type="text" value="Yes"/>
Small Purchase/Informal Purchase	<input type="text" value="Yes"/>
Formal Contracts: Sealed Bids/Competitive Proposals	<input type="text" value="Yes"/>
Non-Competitive Procurement (including emergency procurements)	<input type="text" value="Yes"/>

Comments about Procurement Methods Used

Group Purchasing Efforts

1. How many additional purchases did you make utilizing cooperative agreements or group organizations? Select the number of Group Purchasing Efforts (1-10 are the available options)
2. The name and details of each group purchasing effort should be entered within the table. Include the name of group purchasing effort, vendor name, goods and services provided, total amount paid, and group type (CN Cooperative, Agent, or third-party).
3. Any comments about group purchasing efforts can be entered within the comment box. For additional information, refer to the [USDA Foods Consortia](https://www.usda.gov/food-secure-consortia) website.

Group Purchasing Efforts

How many additional purchases did you make utilizing cooperative agreements or group organizations?

(Group Purchasing Efforts refer to group(s) of sponsors or districts that work together to purchase items like Milk & Dairy products, Bread products, Equipment, etc.)

Group Purchasing Efforts Details

Group Purchasing Effort/Name	Vendor Name	General Goods/Services Provided	Total Paid to 3rd party/Vendor	Group Type	Comments
TLC Group Purchasing	Quarter Farms	Dairy	\$25,478	Third Party E <input style="width: 20px;" type="text"/>	

Overall Comments about Group Purchasing Efforts

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Market-Basket Analysis for Evaluation of Contract Awards

Note: A market basket analysis applies only to formal contracts and is a method of evaluating goods based on a representative sample in relation to the estimated contract value, the addition of goods, if allowed, and the limit to the contract value when additions are allowed.

1. How many Market Basket Analysis for Evaluation of Contract Award items would you like to add?
Select the total number of market basket analysis contract awards (1-10).
2. The names and details of each contract award should be included in the table. The number of lines will be generated in the table based on the total number stated above.
3. Any comments about the market basket analysis can be entered within the comment box.

Market Basket Analysis for Evaluation of Contract Awards

A market basket analysis applies only to formal contracts and is a method of evaluating goods based on a representative sample in relation to the estimated contract value, the addition of goods, if allowed, and the limit to the contract value when additions are allowed.

How many Market Basket Analysis for Evaluation of Contract Awards items would you like to add?

Market Basket Analysis for Evaluation of Contract Award Details

Vendor Name	General Goods/Services Provided	Total Paid to 3rd Party/Vendor	Comments
State Produce Farms	Fruits and Vegetables	\$102,253	

Comments about Market Basket Analysis for Evaluation of Contract Awards

Our district completed the formal method of procurement for this vendor and maintains documentation of purchasing activities.

Micro-Purchasing

1. Select the number of vendors: enter the total number of micro-purchase items (1-50 are the available options)
2. List all micro-purchases by vendor. Only one line per vendor. The names and details of each purchase should be included in the table. The number of lines will be generated in the table based on the total number stated above.
3. Any comments about micro-purchasing can be entered within the comment box.

Micro-Purchasing

Select number of vendors (use the drop down):

Micro-Purchasing Details

List all Micro-purchases by vendor name. Only one line per vendor.

Vendor Name	General Goods/Services Provided	Total Paid to Vendor	# Purchases from vendor during SY	Comments
Quick Grocery Store	Various Goods and Products	\$145.21	4	

Comments about Micro-Purchasing

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Small Purchase/Informal Purchase

1. Enter the number of quotes required for your school district. Refer to procurement/purchasing policies and/or procedures.
2. Select the number of vendors: Enter the total number of small purchases (1-21 or more).
3. List all Small/Informal purchases by vendor. Only one line per vendor. The names and details of each purchase should be included in the table. Lines will be generated in the table based on the total number stated above. You may utilize the legend in this section as guidance.
4. Any comments related to this section, can be entered within the comment box.

Small Purchase/Informal Purchase

How many quotes does your district require per the procurement policy or procedure?

Select number of vendors (use the drop down):

Legend:

Vendor Name	Official Name of Vendor
General Goods/Services Provided	Provide a short description of the goods/services that are provided
Total Paid to Vendor	Total amount that has been paid to this vendor
# Purchases during FY	# Purchases made from this vendor during SY? (one time vs multiple)
# Responses	How many responses were received?
Were purchases from a third-party entity?	Were purchases from a third-party entity?
Select for Review	MDE Only field

Small Purchase/Informal Purchases
List all Small/Informal purchases by vendor name. Only one line per vendor.

Vendor Name	General Good/Services Provided	Total Paid to Vendor	# Purchases during SY	# Responses	Were purchases from a third-party entity?
Equipment Depot	Combi Oven	\$21,250.19	1	Multipl	No

Overall Comments about Small Purchase/Informal Purchases

Formal Contracts

1. Select the number of vendors: Enter the total number of formal contracts (1-21 or more)
2. List all Formal purchases by vendor. Only one line per vendor. The names and details of each contract should be included in the table. The number of lines will be generated in the table based on the total number stated above. You may utilize the legend as guidance.
3. Any comments related to this section, can be entered within the comment box.

Formal Contracts

Select number of vendors (use the drop down):

Legend:

Vendor Name	Official Name of Vendor
General Goods/Services Provided	Provide a short description of the goods/services that are provided
Contract Value	Enter total contract value
Solicitation Type	Invitation for Bid (Bid) or Request for Proposal (Proposal)
Contract Type	Fixed Price (FP) or Cost Reimbursable (CR)
Contract Duration	Less than 1 year, 1 year, or more than 1 year
Number of Responses	How many responses to the solicitation did the SFA receive?
Obtained using CN Coop/Agent/3rd Party	Was this contract obtained using a CN Coop/Agent/3rd-party entity?
Contract Amended	Was contract amended after award?
Select for Review	MDE only

Vendor Name	General Goods/Services Provided	Contract Value	Solicitation Type	Contract Type	Contract Duration	Number of responses	Obtained using CN Coop/Agent/3rd Party	Contract Amended
Total Equip	Kitchen Equipment	\$89,523.79	Bid	FP	<1 yr	5	No	No

Comments about Formal Contracts

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Noncompetitive Procurement

1. Select the number of noncompetitive purchases: Enter the total number of contracts (1-5 vendor options are available)
2. Enter the vendor(s) name, goods and services provided, contract amount, solicitation type (IFB, RFP, Quotations), type of noncompetitive procurement (drop-down of choices), respond to the question about CN Co-operative/Agent/Third party entity purchase, and state if the contract was amended.
3. Any comments related to this section, can be entered within the comment box.

Non-Competitive Procurement	
How many Non-Competitive Procurements (including emergency procurements) do you have?	1
Non-Competitive Procurement Details 1	
Vendor Name	Pizza to Go!
Goods/Services Provided	Pizza
Contract Amount	\$15,670
Solicitation Type	Request for Quotation (RFQ)
Type of Non-Competitive Procurement	MDE authorized a noncompetitive procurement in response to a written request from the Sponsor
Was this vendor/contract obtained using a CN Coop/Agent/Third-Party Entity?	No
Was contract amended after award?	No
Comments	

Notes

1. Sponsor Notes: additional notes may be added in this section related to the information form and the review.
2. MDE-Procurement Review Entrance Conference Notes will be added in this section.

Notes
Sponsor Notes: Our district has maintained all documentation related to all methods of procurement stated in this information form.

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Food Service Contract Sponsor Information (Questionnaire) Form

- The Sponsors' Procurement Review Information (Questionnaire) Form is also available in GEMS/MARS under the Procurement Review.
- Sponsors will be expected to complete the information (questionnaire) form by the listed due date on the scheduling letter and the pre-assessment form.
- Each section in the Information Form must be completed as applicable to your program. If questions arise, contact your lead reviewer.

Sponsor Information

1. Contract Overseer, the Person Listed in NexSys Coordinated Application as Responsible for Monitoring Contract: Provide the name, title, email address, and phone number. If there is another person responsible for contract monitoring list the individual's name and information.
2. How many people are responsible for procurement on behalf of the Sponsor's School Nutrition Department?
 - Enter the names, positions/titles, email addresses, and phone numbers of staff members who hold key procurement responsibilities. We would expect to see staff members such as the business manager, Food Service Director, Assistant Director, Superintendent, and possibly building or kitchen leads or support staff if they are conducting major procurement activities.
 - List Procurement Duties: All procurement duties should be listed. The duties may include, purchasing, ordering, approvals, reviewing, etc.
3. Any comments related to this section can be entered within the comment box.

Sponsor Information				
Sponsor Name:	<input type="text"/>			
Sponsor Number:	<input type="text"/>			
Contract Overseer, the Person Listed in Nexsys Coordinated Application as Responsible for Monitoring Contract:				
Name	Title	Email	Phone	
<input type="text" value="Ann Bailey"/>	<input type="text" value="Chief Financial Officer"/>	<input type="text" value="ann.bailey@abcschools.net"/>	<input type="text" value="517-333-3335"/>	
If Different from Above, Person Responsible for Monitoring Contract:				
Name	Title	Email	Phone	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
How many people are responsible for procurement on behalf of the Sponsor's School Nutrition Department?				
			<input type="text" value="2"/>	
Details for responsible parties:				
Name	Position/Title	Email	Phone	List procurement duties
<input type="text" value="Sally Smith"/>	<input type="text" value="Food Service Director"/>	<input type="text" value="sally.smith@abcschools.net"/>	<input type="text" value="517-333-3333"/>	<input type="text" value="Ordering, purchasing..."/>
<input type="text" value="Jim Walker"/>	<input type="text" value="Business Manager"/>	<input type="text" value="jim.walker@abcschools.net"/>	<input type="text" value="517-333-3334"/>	<input type="text" value="Approvals, procurement..."/>
Comments				
<input type="text"/>				

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Annual Procurement Training Requirement

1. All staff with responsibility for procurement must participate in annual training.
 - Select **Yes or No** to confirm this statement:
Have all staff listed above with procurement-related responsibilities completed procurement training for the year of review, related to their specific role with procurement?
2. Training documentation must be uploaded in the pre-assessment form to verify the trainings completed and dates of completion for review.

The screenshot shows a form titled "Annual Procurement Training Requirement". It contains a statement: "All staff with responsibilities for procurement must participate in annual training." Below this is a question: "Have all staff listed above with procurement related responsibilities completed procurement training for the year of review, related to their specific role with procurement?" To the right of the question is a dropdown menu with "Yes" selected.

General Procurement

Micro & Small Purchase Threshold Information

1. Enter all threshold amounts for micro-purchases, and small purchases (for food, services, and supplies/materials). These amounts may be noted in a policy/procedure. School boards or local authorities can set thresholds lower than the Federal or State of Michigan requirements. What consortium for USDA Foods was chosen for the review year, and what broadline distributor was used? Select the name of the consortium the district utilized for the school year: Macomb-Oakland-Wayne RESA (MOR), School Purchasing and Resource Consortium (SPARC), and Great Lakes Consortium (GLC).
2. Enter the total paid amount to the distributor for USDA and commercial foods.
3. Did you procure goods, services, food, or equipment outside the food service contract? Select **yes** or **no**.
4. Any comments about group purchasing efforts can be entered within the comment box. For additional information, refer to the [USDA Foods Consortia](#) website.

The screenshot shows a form titled "General Procurement". It contains a section titled "Micro & Small Purchase Threshold Information" with the instruction: "Enter the sponsors threshold amounts under each category. If using the State of MI thresholds, list the amounts in the categories." Below this are several input fields:

- What is the Sponsor's Micro purchase threshold? \$2,500
- What is the Sponsor's small purchase threshold for Food? \$100,000
- What is the Sponsor's small purchase threshold for Services? \$250,000
- What is the Sponsor's small purchase threshold for Supplies, Materials, and Equipment? \$25,000
- What consortium for USDA Foods was chosen for the review year, and what broadline distributor was used? GLC (Great Lakes Consortium) - Gordon Food Service
- Total Paid to Distributor for USDA and Commercial Foods \$474,020.31
- Did you procure goods, services, food, or equipment outside the food service contract? Yes

At the bottom, there is a section for "Comments about General Procurement".

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Contract Management and Invoice Reconciliation

1. Enter the original contract year of the food service contract.
2. Select (check) the programs the district participates in:
 - Fresh Fruit and Vegetable Program
 - 10 Cents a Meal for Michigan’s Kids and Farms
 - School Nutrition Programs
 - Child and Adult Care Food Program
 - Summer Food Service Program
3. Select the type of contract (drop-down): Food Service Management Cost Reimbursable or Fixed Priced and/or Vended Meal Company
4. Enter the company name and indicate if any amendments were executed within the contract.
5. **Type responses or select the appropriate answer** for all questions related to the contract:
 - How do you ensure that the Food Service Operation receives the full value of USDA Foods from the Company in relation to your Planned Assistance Level (PAL)?
 - Describe your process for monitoring invoices for the accuracy of all charges and to make sure only allowable costs are included.
 - Describe how records are kept to document expenses (i.e. invoices for food, supplies, labor, etc.).
 - Does the Company provide wholesome, unspoiled meals that meet food component specifications as outlined in the contract?
 - Does the Company provide all records upon request? Such as menus, production records, delivery tickets, health and safety certifications, meal count records, training documentation, and other documentation to support the claim for reimbursement.
 - ✓ If no, describe how the situation was handled.
 - How do you audit time reports on FSMC invoices to ensure only actual work hours are billed?
 - How do you ensure that expenses are not double billed? For example, a point-of-sale system is billed as an operating and administrative expense.
 - How do you monitor invoices and operating statements to ensure you pay the actual ‘cost’ for the goods/services billed for payment?

Contract Management and Invoice Reconciliation	
Original food service contract year:	2023-2024
Which Programs do you currently participate in?	<input checked="" type="checkbox"/> Fresh Fruit and Vegetable Program <input checked="" type="checkbox"/> 10 Cents a Meal for Michigan's Kids and Farms <input checked="" type="checkbox"/> School Nutrition Programs <input checked="" type="checkbox"/> Child and Adult Care Food Program <input checked="" type="checkbox"/> Summer Food Service Program
Type of contract:	Food Service Management Company Cost Reimbursable
Company/Vendor Name:	Great Lakes Food Management Company
Were any amendments or addenda added to the contract after the initial contract was executed?	Yes
How do you ensure that the Food Service Operation receives the full value of USDA Foods from the Company in relation to your Planned Assistance Level (PAL)?	
Describe your process for monitoring invoices for the accuracy of all charges and to make sure only allowable costs are included.	
Describe how records are kept to document expenses (i.e. invoices for food, supplies, labor, etc.).	

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Does the Company provide wholesome, unspoiled meals that meet food component specifications as outlined in the contract?

Does the Company provide all records upon request? Such as menus, production records, delivery tickets, health and safety certifications, meal count records, training documentation, and other documentation to support the claim for reimbursement.

If no, describe how the situation was handled.

How do you audit time reports on FSMC invoices to ensure only actual work hours are billed?

How do you ensure that expenses are not double billed? Example – a point of sale system is billed as an operating expense and an administrative expense.

How do you monitor invoices and operating statements to ensure you pay the actual 'cost' for the goods/services billed for payment?

Procurement Methods Used

This section will only appear if the answer is yes for General Procurement Question 3 “Did you procure goods, services, food, or equipment outside the food service contract?”

For each procurement method listed, select the methods used within the school year with a **Yes or No** response. If yes, is selected, additional information is required in the form.

1. Group Purchasing Efforts
2. Market Basket Analysis
3. Micro-Purchasing
4. Small/Informal Purchase
5. Formal Contracts: Sealed bids/competitive Proposals
6. Noncompetitive Procurement

Procurement Methods Used	
Were the following procurement methods used?	
Group Purchasing Efforts (Consortia, CN Cooperative, Agent, Third-party)	<input type="text" value="Yes"/>
Market Basket Analysis for Evaluation of Contract Award	<input type="text" value="Yes"/>
Micro-Purchasing	<input type="text" value="Yes"/>
Small Purchase/Informal Purchase	<input type="text" value="Yes"/>
Formal Contracts: Sealed Bids/Competitive Proposals	<input type="text" value="Yes"/>
Non-Competitive Procurement (including emergency procurements)	<input type="text" value="Yes"/>
Comments about Procurement Methods Used	

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Group Purchasing Efforts

1. How many additional purchases did you make utilizing cooperative agreements or group organizations? Select the number of Group Purchasing Efforts (1-10 are the available options)
2. The name and details of each group purchasing efforts should be entered within the table. Include the name of group purchasing effort, vendor name, goods and services provided, total amount paid, and group type (CN Cooperative, Agent, or third-party).
3. Any comments about group purchasing efforts can be entered within the comment box. For additional information, refer to the [USDA Foods Consortia](#) website.

Group Purchasing Efforts

How many additional purchases did you make utilizing cooperative agreements or group organizations?

(Group Purchasing Efforts refer to group(s) of sponsors or districts that work together to purchase items like Milk & Dairy products, Bread products, Equipment, etc.)

Group Purchasing Efforts Details

Group Purchasing Effort/Name	Vendor Name	General Goods/Services Provided	Total Paid to 3rd party/Vendor	Group Type	Comments
TLC Group Purchasing	Quarter Farms	Dairy	\$25,478	Third Party E	

Overall Comments about Group Purchasing Efforts

Market-Basket Analysis for Evaluation of Contract Awards

Note: A market basket analysis applies only to formal contracts and is a method of evaluating goods based on a representative sample in relation to the estimated contract value, the addition of goods, if allowed, and the limit to the contract value when additions are allowed.

1. How many Market Basket Analysis for Evaluation of Contract Award items would you like to add? Select the total number of market basket analysis contract awards (1-10).
2. The names and details of each contract award should be included in the table. The number of lines will be generated in the table based on the total number stated above.
3. Any comments about the market basket analysis can be entered within the comment box.

Market Basket Analysis for Evaluation of Contract Awards

A market basket analysis applies only to formal contracts and is a method of evaluating goods based on a representative sample in relation to the estimated contract value, the addition of goods, if allowed, and the limit to the contract value when additions are allowed.

How many Market Basket Analysis for Evaluation of Contract Awards items would you like to add?

Market Basket Analysis for Evaluation of Contract Award Details

Vendor Name	General Goods/Services Provided	Total Paid to 3rd Party/Vendor	Comments
State Produce Farms	Fruits and Vegetables	\$102,253	

Comments about Market Basket Analysis for Evaluation of Contract Awards

Our district completed the formal method of procurement for this vendor and maintains documentation of purchasing activities.

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Micro-Purchasing

1. Select the number of vendors: enter the total number of Micro-Purchase items (1-50 are the available options)
2. List all Micro-Purchases by vendor. Only one line per vendor. The names and details of each purchase should be included in the table. The number of lines will be generated in the table based on the total number stated above.
3. Any comments about Micro-Purchasing can be entered within the comment box.

Micro-Purchasing

Select number of vendors (use the drop down):

Micro-Purchasing Details
List all Micro-purchases by vendor name. Only one line per vendor.

Vendor Name	General Goods/Services Provided	Total Paid to Vendor	# Purchases from vendor during SY	Comments
Quick Grocery Store	Various Goods and Products	\$145.21	4	

Comments about Micro-Purchasing

Small Purchase/Informal Purchase

1. Enter the number of quotes required for your school district. Refer to procurement/purchasing policies and/or procedures.
2. Select the number of vendors: Enter the total number of small purchases (1-21 or more).
3. List all Small/Informal purchases by vendor. Only one line per vendor. The names and details of each purchase should be included in the table. Lines will be generated in the table based on the total number stated above. You may utilize the legend in this section as guidance.
4. Any comments related to this section, can be entered within the comment box.

Small Purchase/Informal Purchase

How many quotes does your district require per the procurement policy or procedure?

Select number of vendors (use the drop down):

Legend:

Vendor Name	Official Name of Vendor
General Goods/Services Provided	Provide a short description of the goods/services that are provided
Total Paid to Vendor	Total amount that has been paid to this vendor
# Purchases during FY	# Purchases made from this vendor during SY? (one time vs multiple)
# Responses	How many responses were received?
Were purchases from a third-party entity?	Were purchases from a third-party entity?
Select for Review	MDE Only field

Small Purchase/Informal Purchases
List all Small/Informal purchases by vendor name. Only one line per vendor.

Vendor Name	General Good/Services Provided	Total Paid to Vendor	# Purchases during SY	# Responses	Were purchases from a third-party entity?
Equipment Depot	Combi Oven	\$21,250.19	1	Multipl <input type="text"/>	No

Overall Comments about Small Purchase/Informal Purchases

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Formal Contracts

1. Select the number of vendors: Enter the total number of formal contracts (1-21 or more)
2. List all Formal purchases by vendor. Only one line per vendor. The names and details of each contract should be included in the table. The number of lines will be generated in the table based on the total number stated above. You may utilize the legend as guidance.
3. Any comments related to this section, can be entered within the comment box.

Formal Contracts

Select number of vendors (use the drop down):

Legend:

Vendor Name	Official Name of Vendor
General Goods/Services Provided	Provide a short description of the goods/services that are provided
Contract Value	Enter total contract value
Solicitation Type	Invitation for Bid (Bid) or Request for Proposal (Proposal)
Contract Type	Fixed Price (FP) or Cost Reimbursable (CR)
Contract Duration	Less than 1 year, 1 year, or more than 1 year
Number of Responses	How many responses to the solicitation did the SFA receive?
Obtained using CN Coop/Agent/3rd Party	Was this contract obtained using a CN Coop/Agent/3rd-party entity?
Contract Amended	Was contract amended after award?
Select for Review	MDE only

Vendor Name	General Goods/Services Provided	Contract Value	Solicitation Type	Contract Type	Contract Duration	Number of responses	Obtained using CN Coop/Agent/3rd Party	Contract Amended
Total Equip	Kitchen Equipment	\$89,523.79	Bid	FP	<1 yr	5	No	No

Comments about Formal Contracts

Noncompetitive Procurement

1. Select the number of noncompetitive purchases: Enter the total number of contracts (1-5 vendor options are available)
2. Enter the vendor(s) name, goods and services provided, contract amount, solicitation type (IFB, RFP, Quotations), type of noncompetitive procurement (drop-down of choices), respond to the question about CN Co-operative/Agent/Third party entity purchase, and state if the contract was amended.
3. Any comments related to this section, can be entered within the comment box.

Non-Competitive Procurement

How many Non-Competitive Procurements (including emergency procurements) do you have?

Non-Competitive Procurement Details 1

Vendor Name

Goods/Services Provided

Contract Amount

Solicitation Type

Type of Non-Competitive Procurement

Was this vendor/contract obtained using a CN Coop/Agent/Third-Party Entity?

Was contract amended after award?

Comments

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Notes

1. Sponsor Notes: additional notes may be added in this section related to the information form and the review.
2. MDE-Procurement Review Entrance Conference Notes will be added in this section.

Notes

Sponsor Notes:

Our district has maintained all documentation related to all methods of procurement stated in this information form.

Documentation Submission

- The lead reviewer will review the Sponsor's Pre-Assessment form to ensure the required documentation has been uploaded.
- Upon reviewing the Vendor Paid List, the lead reviewer will select vendors for review and a documentation request letter will be sent to the sponsor from GEMS/MARS with a due date.
- Vendor documentation should be uploaded in GEMS/MARS under the "Supporting Documentation" link.
Documentation requested may include all of the following:
 - Invoices, receipts, purchase orders
 - Solicitations, evaluations, and contracts, plus copies of three vendor invoices for each vendor selected for review [2 CFR 200.318(i)]
 - Responses (quotes for informal procurement procedures and bids/offers for formal procurement procedures)
 - Amended contract language, as applicable (MDE will need to review amended contracts to determine if a material change was created.)
- In the event the Sponsor lacks documentation to support procurements, MDE will document this and proceed with technical assistance and findings to include a corrective action plan.

MDE Document Review

- The lead reviewer will assess all documentation to ensure compliance with local, State, and Federal regulations, and will ensure the following has been conducted:
 - Did the sponsor follow their procurement procedures and policies?
 - Was competition fair, open, and unrestricted?
 - Is required language and provisions included in contracts?
 - Are there any unallowable provisions in contracts?
- The document review process timeframe is undetermined due to the number of procurement reviews scheduled within the year.

Comprehensive Procurement Review

School Nutrition Program Sponsor Steps

Exit Conference, Corrective Action, and Closeout

- The Sponsor will receive a Findings Report that includes applicable Findings, expected Corrective Action(s), and a summary of the technical assistance provided via communication through GEMS/MARS.
- An Exit Conference will then be scheduled in Teams or may be held via phone, virtual, or in person.
- At a minimum, the business/finance staff member and food service director should be on the Exit Conference call. If you have more than one person who is responsible for program compliance, consider involving them in the Exit Conference.
- The Exit Conference will consist primarily of:
 - Documentation submitted (discussions, if applicable)
 - A review of findings identified (if applicable)
 - Explanation of requirements and next steps (if applicable)
 - Technical Assistance
 - Resources available
 - Expectations and instructions how to complete corrective action(s) (if applicable)
- Before or shortly after the exit conference, corrective action and supporting documentation must be entered into GEMS/MARS.
- Corrective actions are due by the date indicated on the GEMS/MARS Findings Letter.
- The MDE lead reviewer will then review the corrective actions and may provide feedback and request revisions or approve the submitted corrective action.
- If actions have been satisfied and approved, a close-out letter will be sent to the sponsor concluding the review.