

Procurement Process for Child Nutrition

FY2023-2024



**OKLAHOMA
Education**



Training Topics

- What is Procurement?
- Methods of Procurement
- Awarding the Bid
- Contracting for Food Service
- Managing the Contract/Agreements
- Records

What is Procurement?

- Procurement is a multi-step process for obtaining equipment, services, materials or supplies for the lowest price.
- **ALL** goods and services purchased with child nutrition funds must be procured using federal regulations.



Purpose of Procurement

The primary purpose of procurement is to ensure that ***open and free competition exists*** to the maximum degree possible

What is to be Procured?

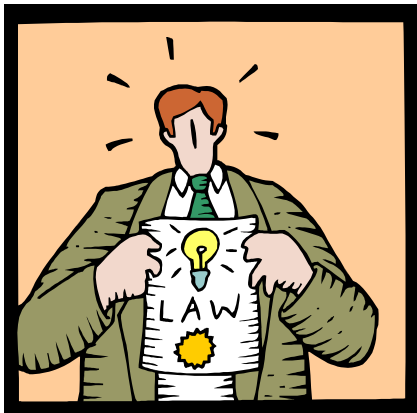
Any products or services purchased with Child Nutrition Funds ***MUST*** be procured using USDA guidelines

Unallowable

**ALL Goods and Services
purchased with Child
Nutrition Funds MUST be
USED by Child Nutrition or
the price must be pro-rated
based on Child Nutrition use**

Preparing for Procurement

In order for the procurement process to be successful, it is strongly advised that you familiarize yourself with the federal and state regulations prior to beginning the process.



Planning

Who are the potential contractors/vendors supplying the market?

What goods/services do we need?

What procurement schedule makes the most sense?



Procurement Starts With the PLANNED MENU

Forecasting describes how you determine the amount of each food item is needed; sourcing describes matching the products you want to possible suppliers.

Forecasting

- Menus for the upcoming year
- Number and ages of children to be served
- USDA foods
- Inventory assessment



Purpose of Procurement

**Responsive
&
Responsible
Contractors**

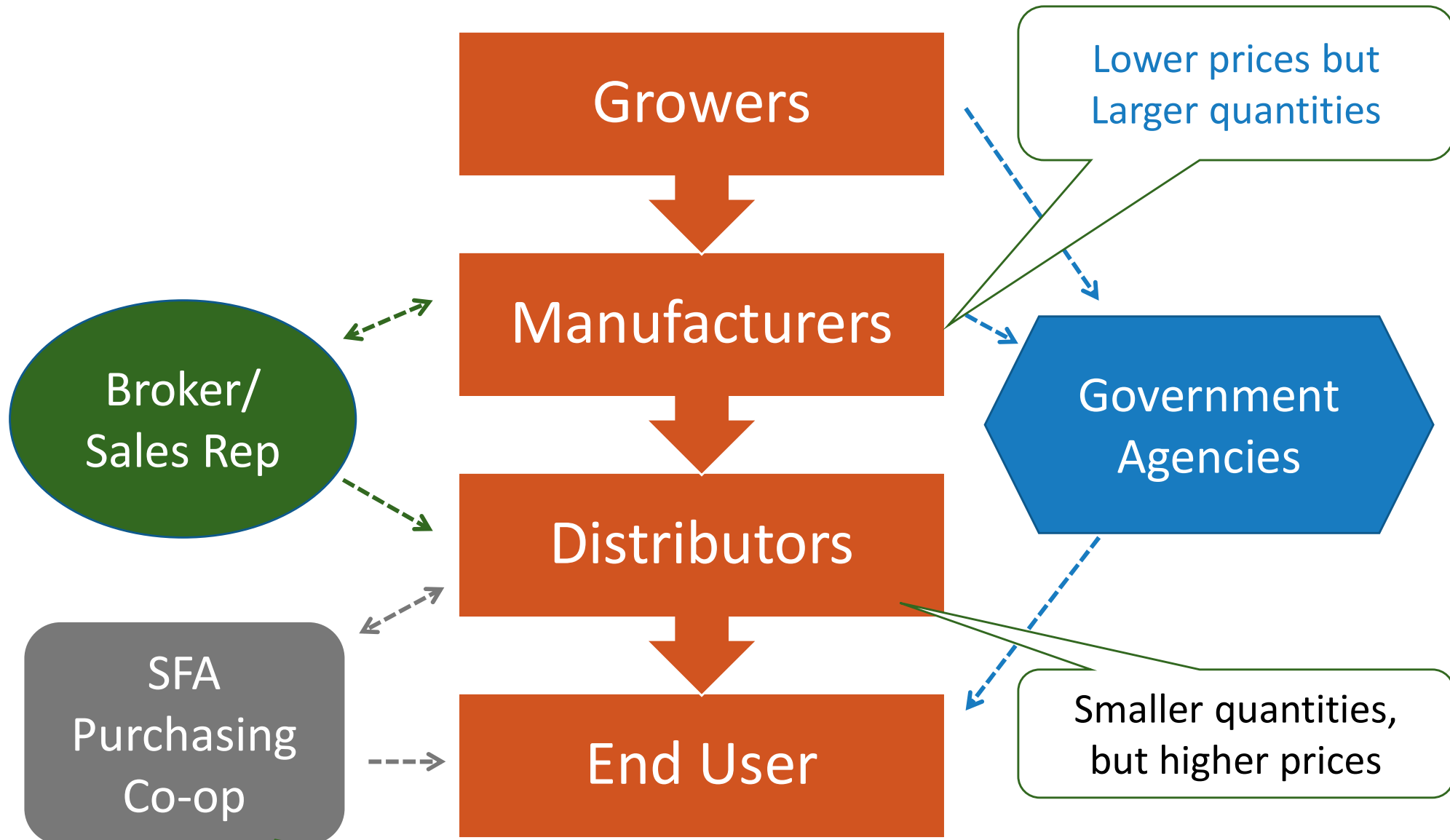
**Fairness &
Integrity**

**Free & Open
Competition**

**Good
Procurement**

Transparency

Reaching Potential Contractors



PROCUREMENT PLAN

Procurement Plan/Procedures

Must be board-approved for schools
(Only when changes have been made to the policy.)

Must Include:

- Methods of Procurement
- Chart of Procedures
- Code of Conduct

Procurement Plan/Procedures

- Protest Procedures (*Schools Only*)
- Buy American (*Schools Only*)
- Minority firms, women's business enterprises, and labor surplus area firms statement
- Geographic Preference
- Beverage contracts (*schools*)
- ***A Procurement Plan prototype that can be adopted is located in Other Documents and the Resource Library that meets USDA requirements (Updated 2023)***

Methods of Procurement

■ Informal Methods

- ✓ Micro-purchase
- ✓ Small purchase procedures
- ✓ Noncompetitive

■ Formal Methods

- ✓ Invitation for Bid (Sealed Bid)
- ✓ Request for Proposal

Chart of Procedures

Example
CHART OF PROCEDURES

The ABC Daycare Center/Sponsor 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	HOW OFTEN ARE PRICE QUOTES OBTAINED	PROCUREMENT METHOD USED
Milk	<i>Annually</i>	<i>Small Purchase</i>
Bread	<i>As Needed</i>	<i>Microprocuring</i>
Fruits (canned/frozen)	<i>4 times a year</i>	<i>Small Purchase</i>
Vegetables (canned/frozen)	<i>4 times a year</i>	<i>Small Purchase</i>
Fruit (Fresh)	<i>As Needed</i>	<i>Microprocuring</i>
Vegetables (Fresh)	<i>As Needed</i>	<i>Microprocuring</i>
Meats	<i>Twice a year</i>	<i>Small Purchase</i>
Processed Food Items (CN labeled)	<i>Twice a year</i>	<i>Small Purchase</i>
Plates/Utensils	<i>Annually</i>	<i>Small Purchase</i>
Chemicals - Cleaning Products	<i>As Needed</i>	<i>Microprocuring</i>
Non-Food related supplies	<i>As Needed</i>	<i>Microprocuring</i>
Small equipment	<i>As Needed</i>	<i>Microprocuring</i>

Microprocuring, Small Purchase, and Noncompetitive

INFORMAL PROCUREMENT

Micro-Purchase

- Aggregate transaction does not exceed \$10,000
 - Institutions are allowed to have a higher threshold. However, it must have State Agency approval annually and justification on why it must be increased
- Purchases distributed among ***multiple***, qualified suppliers
- No quotes required

Micro-Purchase

- Considers the price to be reasonable based on research, experience, purchase history, or other information and documents it files accordingly
(2 CFR 200.320(a)(1)(ii))
- *Most common method for Daycare Centers*
- * *Schools mainly used in an emergency situations*

Multiple Sources for Micro Purchasing

- Program operators may not purchase from only one source
- Purchases must be regularly made using multiple, available qualified sources
- The products or services may be similar or dissimilar purchased at once as a single, collective unit

Micro-Purchase *Example*

This may be used when items normally purchased from the vendor a bid was awarded; however, items were not received from the awarded vendor. When this occurs, the item(s) may be purchased equitably among qualified sources, if the **price is reasonable based on research, experience, purchase history, or other information**

Small Purchase Procedures

Purchases ***under \$250,000*** per bid or solicitation document

- *(The institution can have a threshold lower than the federal threshold, but the district must follow the amount listed in their plan)*

Small Purchase Procedures

- Obtain quotes or **CHECKING PRICES** (by email, telephone, oral, catalogs, websites)
- Check prices at a minimum of 2 qualified stores
- Specifications must be sent out to at least 2 qualified sources when using a vendor
- Document price quotes and why you purchased from a certain supplier?

Small Purchase Procedures

- The requirement is specifications **MUST** be sent out a minimum of 2 or more vendors, **however**, those vendors ***do not*** have to respond to the bid request
- Documentation of Procurement Process
- This is the preferred method if you are using a vendor

CHECKING PRICES FROM LOCAL STORES

Name of Center/Site:		ABC Daycare		Year:	20XX
Name of Food Item Checking Price: <i>(Be Detailed)</i>		Discount Grocery	IGA		
		Price of Item:	Price of Item:		
1	ground beef, 80/20, 3# roll	\$14.79	\$15.69		
2	1% milk, gallon	\$3.19	\$3.09		
3	whole milk, gallon	\$3.19	\$3.29		
4	Kix berry, 32 oz box	\$4.99	\$4.59		
5	Whole wheat bread, Sarah Lee, 1.5lb	\$2.79	\$2.99		
6	Green Beans, green giant, 15 oz can	\$1.29	\$0.99		
7	Hot Dogs, Beef, Bar S	\$3.79	\$3.79		
8	Apple Juice, Motts, 64oz	\$2.99	\$2.94		
9	cottage cheese, 1%, Hiland	\$3.02	\$2.99		
0	Graham Cracker, store brand, 16oz box	\$1.79	\$2.09		
1	Saltine crackers, Zesty, 16oz box	\$1.59	\$1.29		
2	Corn, store brand, 15 oz can	\$0.79	\$0.50		
3	Peaches, sliced, del monte, 15oz can	\$1.29	\$1.00		
4	Fritos, 10oz bag	\$2.09	\$1.98		
5	String cheese, store brand, 24oz	\$2.99	\$2.84		
TOTALS		\$50.58	\$50.06		
Date Prices collected from this store:		2/18/20XX	2/27/20XX		

Micropurchasing vs Small Purchase

Micropurchasing

- Buying from multiple stores similar and dissimilar items such as purchasing emergency food from local grocery store
- Not checking prices
- Buying Child Nutrition items from **multiple** (at least 3) sources/places

Small Purchase

- Check prices from a minimum of **2 sources**
- Institution does not have to go with the lowest vendor
 - However, justification needs to be documented if not the lowest

VENDOR CONTACTS

This form is to be used for SFAs to document single vendor responses. If only one vendor responds, the school food authority (SFA) does not need to do price comparisons.

NAME, ADDRESS, AND TELEPHONE NUMBER OF VENDOR	NAME OF PERSON CONTACTED	DATE OF CONTACT	TYPE OF CONTACT (LETTER, PHONE, PERSONAL)	RESPONSE RECEIVED

Noncompetitive Proposals

- Emergency circumstances
- Item available from only one source
- Competition is inadequate
- Awarding agency (OSDE) authorizes noncompetitive proposals

Invitation For Bid (IFB) or Sealed Bid and Request For Proposal (RFP)

FORMAL PROCUREMENT

Formal Procurement

- Purchases **OVER \$250,000** per bid or solicitation document (*The entity can have a threshold lower than the federal threshold, but the district must follow the amount listed in their plan*)
- Specifications must be submitted to minimum of 2 vendors.
- An advertisement must be placed in a newspaper for two weeks

Formal Procurement

- The requirement is specifications **MUST** sent out a minimum of 2 or more vendors, **however**, those vendors **do not** have to respond to the bid request
- Quotes will need to be sent back to the district and will be opened on a **specific day & time** as specified by the district and listed in the advertisement

Duration of the Bid

USDA suggest 45 days for IFB (Sealed Bid) and 60 days for an RFP (Request for Proposal) from the time the information is given to vendors until the time of bid opening

It should not be less than 30 days

Invitation for Bid/IFB (Sealed Bid)

The bid will be awarded to the bidder at the bid opening that is responsive and responsible with the lowest price

No Exceptions

Request for Proposal (RFP)

- Required Method of Procurement for all FSMC contract
 - *Contact Karen Davis at OSDE*
- There is a bid deadline. Vendor determination is not done at this time
- **Price** alone is not the sole basis for award, but remains the **primary** consideration when awarding a contract
- Price must be weighted more than any other criteria in the rubric

Evaluation Criteria the district can use to award an RFP.

(Price must be given the highest points and award must equal 100 points. If not interested, the district can leave line of award blank.)

Weight

Criteria

_____ **(points)**

Price

_____ (points)

Service Capability Plan

_____ (points)

Quality

_____ (points)

Experience, References

_____ (points)

Business Practices, Financial Condition/Stability

_____ (points)

Accounting and Reporting System

100 points

TOTAL

RFP Rubric/Evaluation

- It is required a committee of 3-5 people score or evaluate the RFP
 - *It is scored individually first*
 - ***Individuals cannot be told to score a certain way***
 - *Each individual score is added together to see who won the bid*
- Contract is awarded to who has the highest points based on a weighted evaluation for the group
- An evaluation form is available in Other Documents under the Procurement section

RFP Individual Evaluation Form

One form per reviewer

*Evaluation Criteria and weighted points must match the points listed in the RFP

Reviewer:	Sam Gov	Date:	2/14/20XX
Vendor A:	Okie Foods	Vendor B:	CNP LLC Vendor
Vendor C:	Feeding Kids Vendor		

Evaluation Criteria:	Weight Pts from RFP	Points from Reviewer:			Notes:
		Vendor A	Vendor B	Vendor C	
Price	30	30	10	20	
Service Capability Plan	20	15	20	10	
Experience, References	5	5	2	0	
Accounting and Reporting System	20	20	20	15	
Program Financial Profile, Financial Condition, Stability, Business Practices	25	20	18	22	
Involvement of Students, Staff, & Patrons	0	0	0	0	

RFP Group Evaluation Form

*Weighted points must match the points listed in the RFP

**It must be evaluated by the committee of 3-5 people*

Date:	2/29/20XX					
Vendor A:	Okie Foods	Vendor B:	CNP LLC Vendor	Vendor C:	Feeding Kids Vendor	
Reviwer Name		Total Points from Reviewer:			Notes:	
		Vendor A	Vendor B	Vendor C		
Sam Gov		90	70	67		
Theresa Kitchens		78	80	65		
Joe Superintendent		85	75	70		
Jane Doe		75	80	70		

Forms & Clauses

- **Buy American information** (All Food & Milk contracts) ***SCHOOLS ONLY***
- **USDA Equal Opportunity information** (contracts \$10,000 or more)
- **Termination for Cause information** (contracts \$10,000 or more)
- **Clean Water Act provision** (contracts \$150,000 or more)

Forms & Clauses

- **Contract work Hours and Safety Standards Act** (contracts \$2,500 or more)
- **Nonkickback Affidavit** (Purchase orders over \$25,000)
- **Davis-Bacon information** (Construction contracts \$2,000 or more)
- **Debarment & Suspension form** (all contracts)
- **Byrd Anti-Lobbying form** (contracts \$100,000 or more)

Procurement Threshold

Districts/Institutions cannot arbitrarily divide purchases to fall below simplified acquisition threshold just to avoid formal procurement methods

TYPES OF PROCUREMENT

Did you spend UNDER \$10,000 AND purchase items from multiple stores?

NO

YES

This is
MICROPURCHASING

Quotes or Price comparison is not required. However, Considers the price to be reasonable based on research, experience, purchase history, or other information and documents it files accordingly (2 CFR 200.320(a)(1)(ii))

*All Procurement documentation must be kept for a minimum of 3 years.

Did you spend UNDER \$250,000 with a store or vendor and compare prices?

NO

YES

This is a SMALL Purchase
= Informal Procurement

YOU NEED:

1. Written Specifications/detailed grocery list.
2. Specification need to be sent to at least 2 or more vendors or prices must be compared from least 2 or more stores.
3. Maintain documentation on a price comparison sheet indicating what stores and prices were compared.

This institution is an equal opportunity provider.

Did you spend OVER \$250,000 with a store or vendor?

YES

This is a LARGE Purchase
= Formal Procurement

YOU NEED:

1. Formal Bids/RFP
2. Formal Evaluation
3. Work with our contract specialist to ensure procurement was conducted correctly.

Types of Formal

Sealed bid = Awarded to lowest price.
RFP = Price is most important factor but can be selected by other factors as well.

Solicitation

BID INFORMATION

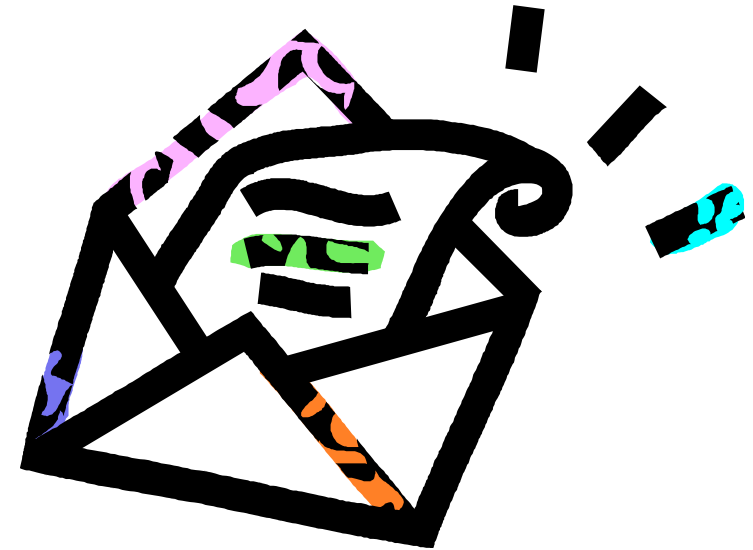
Unallowable Procurement Practices

- **Potential contractor writing the bid proposal or product specifications.**
- **Potential contractor evaluating bid/proposals submitted by competitors.**
- **Purchases without following procurement procedures**

Solicitation Letter

Documentation of Goods & Services

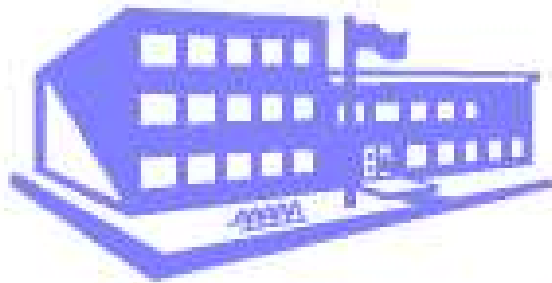
- Letterhead
- Date of letter
- Specifications attached
- Method of response
(ie. Sealed Bid, Fax, Email)
- Deadline for bid/price quotes
- Substitutions and shortages



Solicitation Letter

Documentation of Goods & Services

- Equal Opportunity Employment statement
- Buy American (*schools only*)
- Termination for Cause
 - ✓ Past history, not meeting food descriptions, lack of availability
- Special conditions:
 - ✓ Nutrition Facts labels.
 - ✓ Quantity & quality of food desired.
 - ✓ CN Labels



MODINE PUBLIC SCHOOLS
1234 MODINE AVENUE
MODINE, OKLAHOMA 00000

EXAMPLE OF A SOLICITATION ANNOUNCEMENT

July 6, 20XX

Modine Public Schools announces the opportunity for responsible bidders from the food industry to respond to the attached food specifications valid for the period of August 6, 20XX, to December 17, 20XX. All bidders wishing to respond to this bid period must do so by 2 p.m., July 11, 20XX, at the Education Service Center at the above address. No e-mail or facsimile responses will be accepted.

No other format for the bid response other than the attached specification forms will be accepted. Responses will be evaluated based on the following criteria:

- Best price
- Meeting food descriptions
- Quantity availability
- Past history, if applicable
- Quality of food
- Meeting delivery requirements

Vendors will be expected to ensure that deliveries to Modine Public Schools will be dropped at 1234 Modine Avenue on Mondays and Thursdays between the hours of 1 to 3 p.m. Delivery trucks and product trays must be HACCP-compliant. Sales staff will provide on-site, phone, or e-mail/online ordering methods with e-mail/online confirmation of orders. Any vendors making substitutions of product must contact the district for approval before a substitution can be made.

Nutrition Facts information or Nutrition Facts labels must be provided on all products. Bids will be evaluated on a per-Market Basket.

Modine Public Schools reserves the right to accept or reject any part, or all, of the bid you submit. If all criteria contained within this document are met, successful bidders will be considered.

Bids will be awarded on August 6, 20XX, and all bidders will be notified in writing. Modine Public Schools reserves the right to terminate a vendor who is awarded business but does not follow through with the above requirements.

BUY AMERICAN PROVISION

Section 104(d) amended Section 12(n) of the National School Lunch Act (NSLA) (42 U.S.C. 1760) to require SFAs participating in the National School Lunch Program (NSLP) and School Breakfast Program (SBP) in this contiguous United States to purchase for these programs, to the maximum extent practicable, *domestic USDA Foods or products*.

For purposes of this provision, the term *domestic food commodity or product* means agricultural USDA Foods produced in the United States and food products processed in the United States **SUBSTANTIALLY** using agricultural USDA Foods that are produced in the United States. The conference Report accompanying Public Law 105-336 makes it clear that the term **SUBSTANTIALLY** means that over 51 percent of the processed food comes from American-produced products.

Product Specifications

Definition:

A clear and accurate description of the goods or services that an institution is procuring or wants to purchase

- Ensures the purchase of quality food at competitive prices
- Written to make clear what you want and will accept
- Brand named products only allowed if institution accepts alternative product to be bid or price quote given
 - *Example:* Equal to our better than Tyson Chicken Nugget CN#12345

Specifications Should:

- Be simple but precise
- Be clear and understandable
- Be capable of being met by at least two bidders
- Terms must be identifiable (Use Current Terms)
 - WG Rich
 - CN Label

SPECIFICATION EXAMPLES Page 1 of 2

Item Description	Product Specification	Pack Size	Bid Unit	Est Quantity	Unit Price	Comments
Apples, fresh	125-138 Count	40 pound	Box			
Applesauce, canned	Smooth	6/10	Case			
Peaches, canned	Halves in Natural Juices	6/10	Case			
Pears, canned	Diced in Light Syrup	6/10	Case			
Pineapple, canned	Chunks in Natural Juices	6/10	Case			
Pineapple, canned	Slices packed in Natural Juices	6/10	Case			
Beans, green canned	Cut in low sodium	6/10	Case			
Peas, black-eyed, dry, canned	Cooked with seasoning, brand like Allen's, low sodium	6/10	Case			
Beans, Pinto, dry	Private label	10 Pound	Bag			
Carrots, canned	Sliced in low sodium	6/10	Case			
Corn, canned	Cream Style	6/10	Case			
Potatoes, French-fries, frozen	Oven-ready, crinkle-cut, approved brands equivalent to: ABC Foods A-103, DEF Foods X502, Pots R29	6/10	Case			
Potatoes, dehydrated	Granules, low moisture	10 Pound Box	Case			
Tomatoes, canned	Peeled, diced, low sodium	6/10	Case			
Muffins, banana	Whole grain rich 2oz	Individually	Case			

EXAMPLE ONLY

SPECIFICATION EXAMPLES Page 2 of 2

Item Description	Product Specification	Pack Size	Bid Unit	Est Quantity	Unit Price	Comments
Pasta: spaghetti	Made from whole grain-rich semolina and durum wheat flour, 10 lb only	10-lb box	Pound			
Ground Beef, frozen	80/20	10-lb roll	Case			
Bologna, turkey	Sliced - each slice to weigh 1 oz; no binders, extenders, fillers; CN label required,	12-lb bulk	Pound			
Cheese, mozzarella,	Shredded, part-skim milk, lower sodium	6/5 lb	Case			
Chicken nuggets, breaded, frozen	Boneless chicken breast patty nugget, whole grain-rich breading. Maximum 6 nuggets, minimum 5 nuggets, fully cooked. CN label required	Please specify portions	Case			
Ham, water added	Fully cooked, boneless, smoked and cured. ham and water product, maximum 35%.	8/10 lb each	2/Case			

EXAMPLE ONLY

Solicitation for Procurement

STEP 1

- Write down the **type goods/services, quantities** (for goods) and **frequency** (for services) & **quality** – (Specifications & Chart of Procedures)

STEP 2

- Write a solicitation document & specifications

STEP 3

- Determine the sources to be contacted

STEP 4

- Contact the sources

ADDITIONAL PURCHASING SOURCES

State Contract

- A contract between the vendor (Sysco) and the State of Oklahoma. ***(The state procured)***
 - 1 year contract with up to 4 renewals
 - Start at the beginning of the year
- It is a fixed-cost (vendor cost) plus fixed fee
- There is no salesman and ordering is done online
- State Contract Contact: (Solicitation SW1056)
 - Wendy Clark at Wendy.Clark@omes.ok.gov

Procurement Memo SP-05-2017

Group Purchasing Organizations (GPO) may consider the price for products from GPOs as one source among an adequate number of qualified sources

- *This includes State contract*
- A district will need to reach out to another vendor for price quotes or submit an IFB/RFP if your district goes over the threshold
- A food buying group can be one response and State contract another

Farm to Everything

- Serve local foods in meals
- Hold taste tests and demonstrations using local foods
- Gardening
- Farm Visits
- Culinary activities
- Food-related education



Local Foods

- Distributors
- Farmers
- Farmers markets
- Farm stand
- Local Gardens
- Community Supported Agriculture



AWARDING THE BID

Awarding the Bid

Receiving the price quote/ rate

- Document, document, document!
 - Potential contractor responding
 - Quote or rate
 - Date received
 - Quantity (goods) or frequency (services)
 - Procurement period/Renewals



Awarding the Bid

- Prime Vendor (All or nothing)
- Market Basket/Product Groupings Solicitation
- Line-Item Bid



Prime Vendor

When 80 percent or more
of the food is purchased
from one source

Prime Vendor

Advantages

- District only deals with one supplier
- Orders are placed, delivered, and invoiced with one supplier

Disadvantages

- Some items may cost more since they are mixed together with the calculations for all products
- May limit the number of responding vendors

Market Basket/ Product Groupings Solicitation

Bidder with the lowest price receives award based on ***TOTAL*** prices when all items are combined

Market Basket/ Product Groupings Solicitation

Advantages

- Allows more vendors
- Volumes for the entire lot tend to be large so pricing is strong
- Limits the total number of suppliers to a manageable level
- Provides opportunity to purchase specialty items

Disadvantages

- Some suppliers may not be able to supply all the items. Some lots may not be large enough volume to warrant sufficient competition

Line-Item Bid

Bid is awarded by each product separately to the lowest bidder

Line-Item Bid

Advantages

- Best price for an individual item

Disadvantages

- Need to remember what products from what supplier
- May not be able to meet the distributors minimums for delivery
- May limit the number of responding vendors
- May cost you more in the long run

PURCHASE DOCUMENTATION/PRICE QUOTES

(This form is to be used for SFAs to document all price quotes from vendors.)

DATE	ITEM SPECS	VENDORS						VENDOR SELECTED	REASONS
		VENDOR	S PRICE	VENDOR	S PRICE	VENDOR	S PRICE		

Awarding the Bid: Formal Contracts

IFB/Sealed Bid

- The vendor with the lowest price will win the bid at the bid opening

Request for Proposal/RFP

- The vendor with the highest score on the group evaluation wins the bid
 - A committee of 3-5 people will score each vendor individually. The individual scores will be added together to see who won the bid

CONTRACTING FOR FOOD SERVICE

Contracting for Food Service Management Company

SCHOOLS

If a district wants to contract for Food Service Management (FSMC), the required OSDE RFP must be obtained from our office

- Contact Karen Davis at 405-521-3327 or Karen.Davis@sde.ok.gov

Contracting for Food Service

CACFP

- **If your center plans on contracting for Food Service, the OSDE *Agreement to Furnish Food (Small Purchase) MUST* be used:**
 - Agreement to Furnish Food with a School
 - Agreement to Furnish Food with Entity other than a School
 - Located in the Resource Library
 - Institutions can only claim during the contract months listed in the agreement until a new one is obtained
 - **The Agreement *MUST* be submitted to and approved by OSDE **Annually****

Contracting for Food Service

CACFP

If your center plans on contracting for Food Service, the OSDE Request for Proposal MUST be used on those spending above \$250,000 per contract or if the organization's Formal Procurement threshold is lower than the federal threshold

- ***CACFP Request for Proposal (RFP)***
 - Prototype is located in the Resource Library
 - It is a year to year contract with up to 4 renewals

Contracting for Food Service

CACFP

- The *School* is responsible for Production Records
- *School/Vendor* documents the meals delivered using the ***Contract Meal Delivery Receipt (CMDR) form***
- The CACFP institution maintains ***CMDR*** form – **This is the Center's Menu as Served record**
- School/Vendor bills CACFP institution
- CACFP institution claims reimbursement

Contract Meal Delivery Receipt form

If this form is not filled out correctly or not being maintained, it can result in an overclaim

EXAMPLE
CONTRACT MEAL SERVICE DELIVERY RECEIPT
 (Keep in your institution's monthly folder. *USE ONE RECEIPT PER MEAL SERVICE.*)

DATE: 10/06/YYYY
 MEAL TYPE: Breakfast Lunch AM/PM/LATE PM Snack Supper
(Circle One)

SITE PREPARING MEAL: XYZ DAY CARE CENTER
 SITE RECEIVING MEAL: TOYS N NOISE DAY CARE CENTER
 DELIVERY TIME: 11:30 AM NUMBER OF MEALS ORDERED/DELIVERED: 14

FOOD ITEMS AND QUANTITIES DELIVERED

MENU	Quantity Delivered:	*Crediting/Portioning Information	Temperature at Delivery
	Number of 1-2 <u>4</u> Number of 3-5 <u>in</u> Number of 6-12 _____ Bulk Delivery <input checked="" type="checkbox"/> Preportioned _____		
Milk	Milk provided by: SITE <u>VENDOR</u> (Circle One) Fat-free milk Record Quantity <u>1 gallon</u>	1-2 = 4 oz each 3-5 = 6 oz each	40*
Vegetable/Juice	Green beans, cut, drained, heated, 2 15-oz cans	1-2 = 1/8 cup each 3-5 = 1/4 cup each	140*
Fruit/Juice	Pineapple chunks, natural juice, 2 20-oz cans	1-2 = 1/8 cup each 3-5 = 1/4 cup each	
Grains/Breads	Country biscuit, 14 1-oz	1/2 biscuit each	140*
Meat/Meat Alternate	Chicken, drumsticks w/ bone and skin, 4.46#	1 drumstick each	165*
Extras	Margarine patties, 14 pats	1 each	

* Crediting/portioning information: i.e., 1 cup spaghetti sauce = 2 ounces meat/meat alternate, 6 chicken nuggets = 2 ounces meat/meat alternate and 1 ounce grains/breads serving, 2 cheese sticks = 1 ounce meat/meat alternate

I acknowledge that the above items and quantities were delivered to this contract site. I did complete the necessary portioning/crediting information. Child Nutrition (CN) labels, Production Information Statements, and/or recipes are available for all combination food items or other applicable components.

Food Service Director
 Signature From Preparator Kitchen

I acknowledge that the above items and quantities were delivered to this contract site.
 INSPECTION DELIVERY: Was the food delivered in a safe/sanitary method? Yes or No
 Were food temperatures proper? Yes or No

Comments: Use portioning utensils provided

Director of Day Care Center
 Signature From Site Receiving Food

FOR INSTITUTION TO USE WHEN CONTRACTING MEALS FROM OUTSIDE VENDOR OR WITHIN OWN INSTITUTION; KEPT IN INSTITUTION'S MONTHLY FOLDER.

Contract Meals – Claiming

CACFP

Meals are claimed based on meals served/consumed NOT on how many meals were delivered/ordered

Example: Licensed for 25. The vendor sends you 25 meals for breakfast, however, only 18 kids were in attendance and received a meal

- ***The institution will be billed for 25 breakfast, but they can only claim 18 meals***
- ***Meal Counts are always taken at the Point of Service***

Contracting for Food Service

Daycare Institutions contracting with a Public School:

- ▶ Schools must charge at a minimum:
 - *Breakfast*—Free Reimbursement Rate
 - *Lunch/Supper*—Free Reimbursement Rate + Value of Commodities
 - *Snack*—Free Reimbursement Rate
- ▶ Contracts are good from ***July 1 – June 30th***. ***A new contract needs to be obtained in July when the new rates are available***

Daycares contracting with Schools

If a daycare is contracting with a school district, ***it is required CACFP Meal Pattern requirements are being delivered.*** A center or Head Start must follow these guidelines and cannot be served NSLP Meal Patterns.

- Serving sizes for CACFP per day may be different than NSLP
- Sugar limitations – cereal, yogurt, and no grain-based desserts

Managing the Contract



Contract Management

- Right product/service
- Right quantity
- Right time
- Right location
- Right cost

You mean I'm supposed to document all that stuff about the type and amount of milk delivered? I just thought I was supposed to put it in the cooler.



Contract/Agreement Management

Best practices:

- Clear & concise contract terms/conditions
- Communicate with contractor
- Contract management plan
- Train employees

Hi, Frank. I just wanted to talk with you about the contract just to make sure everything is clear.



Great idea!



Buy American Provision (*Schools Only*)

- Foods purchased by schools must meet the Buy American requirement to serve domestic foods
- Allows exceptions when domestic products are unavailable or costly
 - Keep ***Buy American Justification form*** on file
- Over 51% of final processed products consist of agricultural commodities grown domestically
- USDA Agricultural Marketing Service's (AMS) weekly market report at:

<https://marketnews.usda.gov/mnp/fv-report-config-step1?type=termPrice>.

Records

PROCUREMENT DOCUMENTATION

Documents For **CACFP** Administrative Reviews

- Procurement Plan
 - Code of Conduct
 - Chart of Procedures
 - Receipts/Invoices
- If Applicable:***
- Product Specifications
 - Bid Documents
 - Agreement to Furnish Food
 - Any additional contracts you may have

Procurement Reviews

SCHOOLS

Procurement Reviews use **PRIOR** year documentation. However, FSMC documents will be from **CURRENT** year

Schools **NOT** using a FSMC

✓ Reviewed every 5 years

Schools **USING** a FSMC

✓ Reviewed every 3 years *(2024-2025 this will change to every 5 years)*

□ These reviews are conducted by DWG Consulting – Robin Dickerson

Documents For Procurement Review Process

- Procurement Plan
- Protest Procedures
- Product Specifications
- Buy American
- Code of Conduct
- Chart of Procedures
- Bid Documentation
- Invoices/Receipts
- Contracts – RFP/IFB
- FSMC Documents
- Revenue & Expenditure from ***Prior Year and current year if using a FSMC***
- Procurement Tool
 - Reviews are contracted with DWG consulting (Robin Dickerson)

Procurement Training for FY2025

- Memo: SP 21-2023 is for **SCHOOLS only**
- ***Requires*** school nutrition program directors, management, and staff who work on NSLP procurement activities to complete procurement ***training annually***
 - ***This includes anyone who handles any Child Nutrition Procurement***

More About Procurement

- Encumbrances and purchase orders
 - Money must be encumbered before goods and services are ordered
- Invoices and receipts signed and dated *(schools)*
- Price quote comparisons/bids maintained
- Nonkickback Affidavit – a notarized form for every contract or Purchase Order over \$25,000

Record Retention

- All documents relating to the procurement
 - 3 years from date of final payment,
- OR***
- Until all audit or protest findings resolved



Resources for Procurement SCHOOLS

- CARS under “Other Documents”
 - <https://cnp.sde.ok.gov/oknslp/PrintDocuments.aspx>
- Child Nutrition Training Manual
 - ✓ Procurement Section
- Institute of Child Nutrition
 - <https://theicn.org/>

Resources for Procurement CACFP

- CACFP Application “Resource Library”
 - <https://cnp.sde.ok.gov/CACFP/PrintDocuments.aspx>
- Child Nutrition Training Manual
 - ✓ Procurement Section
- Institute of Child Nutrition
 - <https://theicn.org/>

Questions?

THANK YOU!

OSDE, Child Nutrition Office number: 405-521-3327

**Give us up to 1 week to email certificates
or post in the Training Calendar**