



Food and  
Nutrition  
Service

DATE: August 19, 2019

MEMO CODE: SP 33-2019

Park Office  
Center

SUBJECT: Updated Template: Local Agency Procurement Review Tool for  
School Food Authorities Beginning in School Year 2019-2020

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TO: Regional Directors  
Special Nutrition Programs  
All Regions

State Directors  
Child Nutrition Programs  
All States

This memorandum provides information on the Food and Nutrition Service (FNS) updated template Local Agency Procurement Review Tool (Tool) for use in school year (SY) 2019-2020. While the concepts of the original Tool remain the same, the updated Tool is now streamlined to reduce burden, consolidate questions, clarify instructions, and improve functionality for school food authorities (SFAs) and state agencies. Tool updates are summarized in the Table of Updates attached. The revised procurement review 3-step process and tools, as announced at the School Nutrition Association Annual National Conference, will be released in fall 2019.

### **Implementing the Tool in SY 2019-2020 Procurement Reviews**

State agencies may implement the updated Tool or modify/develop a State agency tool that meets FNS standards and submit their tool to the appropriate Regional Office for review and approval prior to implementation. The due date for sending a State agency tool will be established by each Regional Office. FNS expects State agencies currently conducting procurement reviews using the revised Tool posted on October 6, 2016, to transition to the updated Tool for reviews commencing by or before January 31, 2020. State agency use of the Tool and oversight documentation will be evaluated during FNS Management Evaluations.

Training on the updated Tool will be conducted by webinars to be announced on PartnerWeb and during face-to-face trainings at stakeholder conferences, or as requested and scheduled through the Regional Offices. State agencies should direct any questions concerning this guidance to the appropriate FNS Regional Office.

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Attachment

**Attachment: Table of Updates  
Template Local Agency Procurement Review Tool**

<b>Review Tab</b>	<b>Update</b>		
SFA procurement table	<ul style="list-style-type: none"> <li>• [NEW] Sections for SFAs to designate market basket analysis and group purchasing entities, if applicable, and for each procurement method used;</li> <li>• Space for the # of purchases from vendor (s)</li> <li>• [NEW] Attestation of compliance when SFAs want to self-certify compliance with Federal procurement standards</li> <li>• [NEW] “<i>Select for Review</i>” at least one vendor must be selected for questions to appear in each tab.</li> </ul>		
Procurement Selection Chart	<ul style="list-style-type: none"> <li>• [NEW] State agency instructions; new selections for market basket and Third-party entities.</li> </ul>		
State agency instructions tab	<ul style="list-style-type: none"> <li>• [NEW] Language or when instructions have been clarified;</li> <li>• [NEW] Checklist of documents (located at the end of the instructions)</li> </ul>		
SFA Instruction tab	<b>Draft # Qs</b>	<b>Current # Qs</b>	Same as State agency instructions
Procurement tabs			<ul style="list-style-type: none"> <li>• [NEW] Feature added on the SFA Procurement Table that enables questions to auto-populates in each applicable tab, if selected for review by the State agency;</li> <li>• [NEW] designates new language or when instructions have been clarified;</li> <li>• [NEW] questions on market basket and group purchasing entities;</li> <li>• [REWORDED] existing questions within the small and formal tabs, in particular, to consolidate multiple questions in one question into one single question;</li> <li>• FSMC tabs: (see below)</li> <li>• Processing tab: (see below)</li> </ul>
• General Standards	5	2	
• Micro-purchase	4	5	
• Small purchase	9	9	
• Formal Procurement (IFB & RFP)	46	22	
• FSMCs (renewal yr.)	11	22*	
• Processing	28	8	
TOTAL	103	68	
2 FSMC review tabs	<ul style="list-style-type: none"> <li>• [NEW] FSMC renewal: added questions for oversight of SFA responsibilities in 7 CFR 210.16 and USDA Foods, for use in 3-year review as required by 7 CFR 210.19(a)(5).</li> <li>• SA Pre-approval: same, use tab when reviewing/approving the original SFA-FSMC contract prior to execution.</li> <li>• [REWORDED] Clarified instructions in each FSMC tab.</li> </ul>		
Processing review tab	[NEW] Uses the applicable procurement methods tab, small purchase or formal procedures, AND the Processing tab when reviewing contracts for USDA Foods processed-end products.		
Summary of Findings	[NEW] Auto-populates with a separate findings page/vendor		
[NEW] Word-version	Same Local Agency Procurement Review Tool as the Excel version, now available in Word.		