

Simplified Acquisition Template for School Meal Programs with Defined Scoring Advantage

Only for the informal purchase of minimally or unprocessed agricultural products.

When the cost of a solicitation is less than the Simplified Acquisition threshold, formerly known as Small Purchase Threshold, sponsors may use an informal method of procurement. The Simplified Acquisition method is an informal method of procurement that can be used for purchases above the micro-purchase threshold.

The Washington State Simplified Acquisition Threshold for public schools is \$75,000; however, if purchasing Washington Grown food, the threshold may be raised to the federal Simplified Acquisition threshold of \$250,000. Keep in mind, your district may have set a more restrictive simplified acquisition threshold so check your procurement policies and procedures.

The Simplified Acquisition method requires sponsors to solicit quotes from an adequate number of qualified sources. Price quotes must be solicited from at least two vendors for purchases ranging from \$10,000 to \$40,000, and from three vendors for purchases ranging from \$40,000 to \$250,000 to ensure competition.

This procurement template was created to help sponsors document their informal procurements using the Simplified Acquisition Method. For more information on the Simplified Acquisition Method, refer to [OSPI's Simplified Acquisition Reference Sheet](#).

1. **Introduction:** An introduction statement tells vendors who you are and outlines the purpose and scope of the procurement process. It can highlight a district's local sourcing goals and the broader context of its Farm to School program.
2. **Product Specifications:** Specifications inform bidders of your district's exact requirements. Vendors must meet these requirements for their bids to be considered responsive. Written specifications are required.
 - **Detailed Product Description:** Clearly state what kind of product you expect, including grading standards, quality, and condition. You can also include local farm indicators like specific crop varieties, farm size, practices, and origin labeling. See the Localized Requirement section for common specifications.
 - **Geographic Preference:** Sponsors can include a definition of "local" in the specifications section of their solicitation. The definition applies to the product origin, not vendor location. For more information on Geographic Preference, refer to the [OSPI Geographic Preference Reference sheet](#).
 - **Delivery and Packaging:** State delivery frequency, preferred packaging, number of schools, and delivery timelines. Consider a central delivery location for local vendors.
 - **Localized Requirements:** The specifications table below lists examples of product specifications tailored for local products. Check the box beside the desired specifications.
 - **Buy American:** Procurement transactions must comply with the Buy American Provision. For more information, refer to the [OSPI Buy American Reference Sheet](#).
3. **Vendor Quote Log:** Districts can contact vendors by email or phone, but each vendor must receive the same information. Price quotes and all other information discussed with responsive bidders must be documented, including business name, contact name, phone number, email address, date quote received, and quoted price. If you are unable to get the required number of responsive quotes, clearly document all outreach attempts and any responses received. Price



quotes must be solicited from at least two vendors for purchases ranging from \$10,000 to \$40,000, and from three vendors for purchases ranging from \$40,000 to \$75,000 to ensure competition. Evaluate which vendor meets your specifications.

4. **Defined Scoring Advantage (Geographic Preference):** School Food Authorities (SFA) can use a scoring system to give preference to bids offering local unprocessed agricultural products. This scoring method must be clearly outlined in the solicitation to ensure fairness and avoid limiting competition. A tiered approach is recommended; for instance, the highest preference could be given to products from a specific county, followed by a multi-county region, and lastly, Washington State. Vendors quoting higher prices may still win contracts if their products meet the highest local preference criteria.
5. **Purchase Record:** The school food authority manages all contracts and keeps documentation on product quality, price, and compliance to ensure vendor responsibility.
 - **Successful Vendor:** Document the successful vendor who meets all the selected specifications and can provide the product at the lowest price.
 - **Buy American Compliant:** To comply with the Buy American Provision, verify that purchased products are either produced in the United States or contain a minimum of 51% ingredients that are grown domestically.
 - **Suspended/Debarred:** For procurement exceeding \$25,000 per year, per vendor, annually verify the vendor is not suspended or debarred via the Systems for Awards Management (SAM) database and document the outcome and the status and date verified to ensure compliance.
 - **Contract Information:** Document the contract award date, method of notification, associated invoice number, and total payment to ensure transparency, traceability, and compliance with procurement regulations, thereby ensuring accountability in all transactions. Additionally, record the SFA staff member's name, title, signature, and the date the contract was issued.
6. **Contract Management:** Document the receipt of the product and verify vendor responsibility. Include the date received and adherence to specifications. Note any details that may help future procurements or vendor interactions.
7. **Recordkeeping:** Keep the solicitation document, along with any written responses from the vendor, for a minimum duration of 3 years.



Local Procurement Inquiry — Simplified Acquisition Method

Introduction:

_____ seeks to purchase _____.

Product Specification:

Detailed Product Description:				Quantity			
Definition of Local (Geographic Preference):							
Delivery and Packaging Requirements (Optional):							
Localized Requirements:							
	Product is Washington Grown		Producer can provide farm or class visits		Producer name and location will be identified.		Products are hand harvested
	Producer is GAP Certified		Product delivered 24 – 72 hours of harvest		Vendor has an on-farm food safety plan		Vendor can deliver directly to multiple school sites

Buy American:

All food products solicited shall be produced in the United States and to the maximum extent possible, contain at least 51% domestically produced products.

Vendor Quote Log:

	Vendor 1	Vendor 2	Vendor 3
Business Name:			
Contact Name:			
Phone Number:			
Email:			
Vendor Address:			
Date Quote Received:			
Meets Specifications?			

Defined Scoring Advantage:

We will apply Geographic Preference for the product(s) listed above. The price percentage for geographic preference is for the purposes of comparison only and only affects the quoted price for awarding of the quote, not the actual price paid to the producer.

Evaluation Criteria	Scoring Scale	Vendor #1	Vendor #2	Vendor #3
Tier #1:				
Tier #2:				
Tier #3:				
	Quoted Price:			
	Price Adjustment: (Scoring purposes only)			
	Successful Bidder:			

Purchase Record:

Successful Vendor:		Buy American Compliant?	
Suspended/Debarred?		Date of Verification:	
Contract Award Date:		Method of Notification:	
Associated Invoice #:		Total Cost:	

Staff Name: _____

Staff Title: _____

Staff Signature: _____

Date: _____

Contract Management:

Date Received:		Met Specifications?	
Notes:			