

Simplified Acquisition Template for School Meal Programs

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 procedures are 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 \$350,000. Keep in mind, your district is responsible for determining (see [RCW 28A.335.190](#)) an appropriate simplified acquisition threshold which may be more restrictive.

The Simplified Acquisition procedures require sponsors to solicit quotes from an adequate number of qualified sources.

This procurement template was created to help sponsors document their informal procurements using the Simplified Acquisition procedures. For more information on the Simplified Acquisition procedures, 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. Written specifications are required.
 - **Detailed Product Description:** Clearly state what kind of product you expect, including the specific quality, condition, and size of the item. You may also include specific crop varieties. Include the total quantity needed.
 - **Definition of Local (Geographic Preference):** For eligible products, sponsors can include a definition of "local" in the specifications section of the solicitation. The definition applies to the product origin, not vendor location. Refer to the [OSPI Geographic Preference Reference sheet](#) for more information.
 - **Packaging and Labeling:** State packaging and labeling requirements and any other details about how you wish to receive the products; this may include a range of acceptable pack sizes and/or case counts.
 - **Buy American:** Procurement transactions must comply with the Buy American Provision. For more information, refer to the [OSPI Buy American Reference Sheet](#).
3. **Vendor Requirements:** Vendors must meet these requirements, such as delivery locations and times, growing practices, and food safety, for their bids to be considered. The table below includes sample vendor requirements to help target local products. Place a check in the box beside the requirements that apply.



4. **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. Evaluate which vendor meets your specifications. 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 \$15,000 to \$40,000, and from three vendors for purchases above \$40,000 to ensure competition. Evaluate which vendor meets your specifications.
5. **Defined Scoring Advantage (Geographic Preference):** School Food Authorities (SFAs) 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.
6. **Purchase Record:** The SFA 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, 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.
7. **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 with future procurements or vendor interactions.
8. **Recordkeeping:** Keep the solicitation document, along with any written responses from the vendor, for a minimum duration of three years.

Local Procurement Inquiry — Simplified Acquisition Procedures

Introduction:

_____ seeks to purchase _____.
_____.

Product Specification:

Detailed Product Description:	Quantity		
Definition of Local - Geographic Preference (optional for eligible products):			
Packaging and Labeling Requirements:			
Delivery Hours, Location(s), and Frequency:			
Optional Requirements to target local foods (place an "X" next to those that apply):			
Products are grown on farms that utilize a majority of hand harvesting, hand packing, or human labor power in growing, harvesting, and packing of food.	Producer can participate in educational activities, such as farm tours, classroom visits, or cafeteria taste tests.	Producer name and location will be identified on product label, case label, invoice, or other acceptable documentation.	Products delivered within 24 – 72 hours of harvest.
Food Safety Plan or GAP certification (if applicable, GAP certification is not federally required).	Products are grown on farms that grow more than five food crops at a time.	Products, or 51% of ingredients, are Washington grown (grown and packed or processed in Washington).	<i>Fill in your own:</i>

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			
Quoted Price			
Meets Specification?			

Defined Scoring Advantage

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

Evaluation Criteria	Scoring Scale	Vendor #1	Vendor #2	Vendor #3
Tier #1: [defined geographic area]				
Tier #2: [defined geographic area]				
Tier #3: [defined geographic area]				
	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:			