

### Local Purchasing Checklist for SFAs

Health and Sanitation	
	Do the vendors' food safety practices align with the sanitation requirements and/ food regulatory codes of the appropriate agency, department, and/or tribal ordinance(s)?
	Do all vendors have food safety training documentation from the last calendar year? At this time, allowable trainings are led by Cooperative Extension, NM Farmers Marketing Association, La Montanita, and/or the Agri-Cultura Network.
	Is an updated food safety plan and traceability summary available for SFA review?
	Have all vendors agreed to an on-farm food safety site visit?
Product Liability	
	Do vendors have proof of the appropriate product liability coverage set by the SFA? There is no requirement from USDA on the amount of insurance needed for vendors to sell to SFAs, but most districts require \$1 million dollar product liability insurance coverage for all approved vendors.
Menu Forecasting and Product Specifications	
	Has the total estimated volume of each product been clearly communicated to vendors?
	Has a price been negotiated for each product? If so, what is the plan for potential price escalation? Confirm with all vendors whether process are set for the school year, or if market escalation will be considered.
	Have all item specifications been provided in writing to vendors? (i.e. variety, size, quality, geographic preference)
	Have all handling/packing requirements been provided in writing to vendors? (i.e. count per case, type of packing materials, post-harvest handling protocols/cleanliness, box labeling). Most SFAs require a packing slip or labeling system that includes delivery date, name of product, weight of box and/or packing size, and name of farm.
Procurement	
	Does all purchasing of local product align with the SFAs Procurement Plan?
	Are the appropriate procurement and documentation procedures being utilized? <ul style="list-style-type: none"> <li>A. If the purchase amount has fallen under the small-purchase threshold of \$3,500, then receipts or invoice documentation is required for procurement records.</li> <li>B. If the purchase is between \$10,000 and \$59,999 then the informal procurement procedure is utilized. The SFA is required to solicit at least three bids. All procurement records are retained for review.</li> <li>C. If the purchase is over \$60,000 then the SFA must implement a formal solicitation (IFB or RFP). All procurement records are retained for review.</li> </ul>
Ordering	
	Do vendors know how far in advance to inform the SFA of their product availability, at what frequency, and the best mode of communication? (i.e. phone, email, fax, or over text)
	Is there an established ordering system that's understood by all parties? Vendors should know the expected timing, frequency, and other logistics associated with delivery.
	Are there procedures in place in case the vendor cannot provide the expected quantity or quality of product?
Payment and Receiving Procedures	
	Does the SFAs HAACP plan include procedures around processing and serving local produce?

	Are there established guidelines for invoicing? It's common for vendors to provide business name, billing address, vendor contact name and contact information, order #, delivery date, price per unit/total weight of product/number of boxes or pallets in the order, and total price for all goods.
	Has the timeline for payment of invoices been clearly communicated to vendors?
Institutional Support	
	Do policies that support local purchasing or farm to school exist at the School Board level?
	Have goals around local purchasing or farm to school been integrated into your SFAs wellness policy?