



# Ten Steps to a Good Procurement



## 1. Plan Your Procurements

Understand the rules of procurement before you get started. Open your calendar and establish sufficient timelines and deadlines to draft and advertise your procurement and develop a reasonable turnaround time for vendor responses. This should be followed by your own evaluation and award process (including approval by your governing board), ordering and receiving.

## 2. Review Your Documents and Procedures

Make sure that all details in both the general requirements sections and for individual items specifications are complete and accurate. Ask someone else to review materials to confirm that information is clear and understandable. Pay special attention to evaluation criteria, avoiding any ambiguities and ensuring that these are reasonable for vendors to meet.

## 3. Forecast, Forecast, Forecast

Use your menu, past production and participation records, school calendar and participation projections to accurately estimate your needs.

## 4. Follow the Protocols: Be Fair, Open and Competitive

Ensure that every qualified vendor has an equal understanding of your requirements and an opportunity to respond.

## 5. Provide Clear Evaluation and Award Criteria: Be Transparent

Everything you expect from your vendor partners must be included in the procurement solicitation. Explain how you will determine the successful vendor and ensure the process is objective. Don't change the rules after the solicitation has been released.

## 6. Partner for an Effective Transition

If the procurement process leads to a change of vendor, be fair to the previous supplier. Don't leave them with significant inventory on hand that "be-

longs" to you. In partnering with your new vendor, discuss order and delivery requirements; never presume that your expectations in the procurement will be passed down the chain to those who will fulfill the contract. Allow and encourage team members from the new vendor to visit your serving sites and understand their individual receiving, storage and preparation constraints and needs.

## 7. Honor Your Contracts

You have as much responsibility to the vendor as the vendor has to you. Do your part to make the contract a success. Make sure you understand your responsibilities and follow through. The procurement process doesn't end with the award.

## 8. Prioritize Protocols for Receiving Deliveries

Train your staff to "inspect what you expect." Make sure you are getting what is stipulated in the contract—in the *manner* that you specified. In particular, staff should check all deliveries to confirm they have arrived in a healthful, sanitary condition. Check brands, pack sizes and condition.

## 9. Check Invoices and Pay Your Bills

Check prices on invoices against the contract price—then pay your bills in a timely manner consistent with the terms of the contract. Do your part to keep vendor costs down by paying your bills. This likely will come back in better pricing on future procurements.

## 10. Avoid Material Changes

A "material change" is any alteration in product, criteria or expectation that, had another vendor been aware of this detail, could have led the company to respond in a different way. Once the contract has been awarded, you can't permit the successful vendor to change anything that would materially affect the terms of the agreement. For example, changing prices (up or down), even in the face of extenuating circumstances, is not allowed unless included in the original solicitation and contract. Changing products is also unacceptable.