

Procurement Review Organizational Tool (PROT)

Sponsors must use this organizational tool to provide the required documentation to the Connecticut State Department of Education's (CSDE) for the [Procurement Review \(PR\)](#) of the U.S. Department of Agriculture's (USDA) Child Nutrition Programs operated by the sponsor.

How to Use this Tool

The PROT contains a section for each type of procurement identified for the PR. Each section contains a list of the procurements and documents that the school food authority (SFA) must:

- **upload** to the Connecticut Online Application and Claiming System for Child Nutrition Programs (CNP System); and
- **print** to have available for the CSDE reviewer during the PR.

Place all required documents under the corresponding cover page in a folder, clipped together, or otherwise organized. Have all documents available for the CSDE reviewer on the first day of the scheduled review.

The sections with titles highlighted in yellow are applicable to the sponsor.

The information is not required if the section title is not highlighted. Documents listed in all highlighted sections are required. If you do not know what the document is, please check with the CSDE reviewer to clarify prior to the upload due date.

Contents

How to Use this Tool.....	1
Contents	1
Micro Purchases	3
Small Purchases	4
Formal Procurements: Request for Proposals (RFP) and Invitation for Bid (IFB)	5
Food Service Management Company (FSMC).....	6
Processing Contracts for USDA Foods	7
Additional Document Requests	8
Instructions for Uploading Documents to the CNP System.....	9

Procurement Review Organizational Tool (PROT)

District: _____

Provide the purchase thresholds indicated in the district's 3000 board of education (BOE) policies or policies specific to the non-profit school food service account.

Micro purchase: _____

Small purchase (three quotes and a buy): _____

Formal purchase (Request for Proposals [RFP] and Invitation for Bid [IFB]): _____

SAMPLE

Procurement Review Organizational Tool (PROT)

Micro Purchases

The information in this section is required if the title above is **highlighted in yellow**. The information is not required if the section title is not highlighted.

Upload as REVIEW ATTACHMENT and print for on-site review

- ☐ Supporting purchase documents (receipts) for the following:

Vendor: _____

- Invoice number and date: _____
- Invoice number and date: _____
- Invoice number and date: _____

Vendor: _____

- Invoice number and date: _____
- Invoice number and date: _____
- Invoice number and date: _____

Procurement Review Organizational Tool (PROT)

Small Purchases

The information in this section is required if the title above is **highlighted in yellow**. The information is not required if the section title is not highlighted.

Upload as REVIEW ATTACHMENT and print for on-site review

☐ **Vendor:** _____

- Solicitation documentation (email, telephone script, etc.)
- Solicitation responses (responses, quotes – written, verbal, emailed)
- Evaluation documentation
- Award/notification
- Supporting purchase documentation (invoices, receipts, etc.)
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____

☐ **Vendor:** _____

- Solicitation documentation (email, telephone script, etc.)
- Solicitation responses (responses, quotes – written, verbal, emailed)
- Evaluation documentation
- Award/notification
- Supporting purchase documentation (invoices, receipts, etc.)
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____

Procurement Review Organizational Tool (PROT)

Formal Procurements:

Request for Proposals (RFP) and Invitation for Bid (IFB)

The information in this section is required if the title above is **highlighted in yellow**. The information is not required if the section title is not highlighted.

Upload as **REVIEW ATTACHMENT** and print for on-site review

- ☐ **Vendor:** _____
- Solicitation documentation: RFP or IFB
 - Cost price analysis prior to bid
 - Public advertisement
 - Evaluation
 - Award/regret to inform notification
 - Copy of contract
 - Supporting purchase documentation (invoices, receipts, etc.)
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____

Procurement Review Organizational Tool (PROT)

Food Service Management Company (FSMC)

The information in this section is required if the title above is **highlighted in yellow**. The information is not required if the section title is not highlighted.

Upload as REVIEW ATTACHMENT and print for on-site review

- ☐ Procurement of FSMC (shows history of procurement)
 - RFP with all supporting documentation
 - Contract and original addendum
 - All annual renewals
 - Any additional amendments/addenda to the FSMC contract
 - Award and “regret to inform” letters
- ☐ Monthly meeting agendas/notes (SFA/FSMC)
- ☐ Food Advisory Council/Board (for parents, students, and staff to discuss menu planning: two times per year per school)
 - Agendas
 - Sign-in sheets with participant designation (parent, student, staff, FSMC)
 - Meeting minutes
- ☐ FSMC Monitoring Forms completed by SFA (two times per year per school)
 - Submit completed forms for 2023-24 or 2024-25
- ☐ USDA Foods Reconciliation forms (completed for initial contract year and any renewal period)
- ☐ FSMC Name: _____
 - Supporting purchase documentation (invoices and profit/loss)
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____

Procurement Review Organizational Tool (PROT)

Processing Contracts for USDA Foods

This information in this section is required if the title above is **highlighted in yellow**. The information is not required if the section title is not highlighted.

Upload as REVIEW ATTACHMENT and print for on-site review

☐ **Vendor:** _____

- Solicitation documentation: RFP or IFB
- Cost price analysis prior to bid
- Public advertisement
- Evaluation
- Award/notification
- Copy of contract and renewals
- Draw down by manufacturer report
- Supporting purchase documentation (invoices, receipts, etc.):
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____

Procurement Review Organizational Tool (PROT)

Additional Document Requests

This information in this section is required for all sponsors.

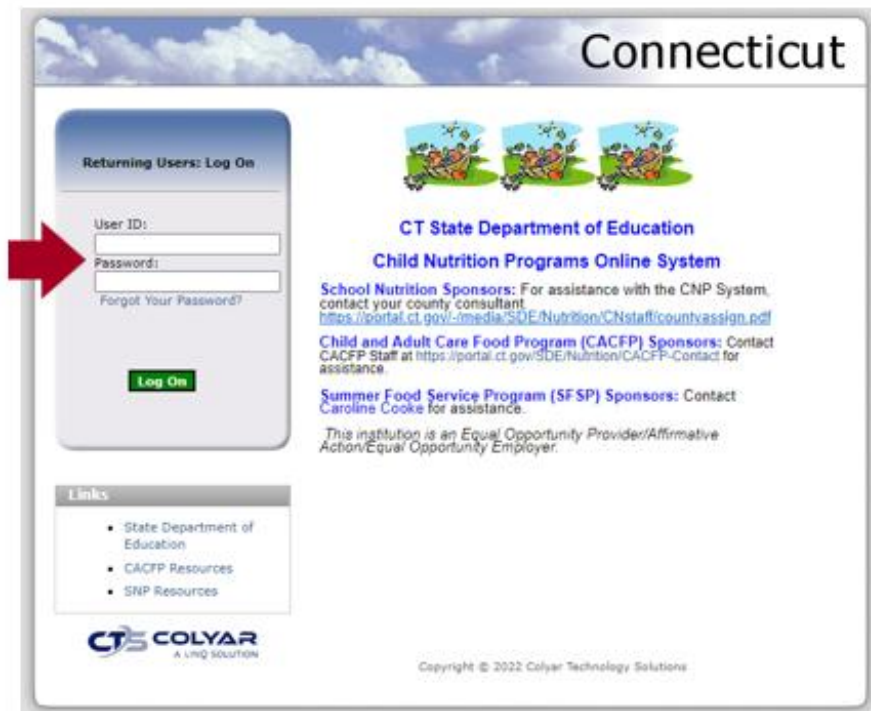
Upload as REVIEW ATTACHMENT and print for on-site review

- ☐ Buy American Justification Form: _____
- ☐ Buy American Invoices (supporting purchase documentation)
 - Invoice number and date: _____
 - Invoice number and date: _____
 - Invoice number and date: _____
- ☐ Farm to School: _____
- ☐ Health Inspection Reports with documentation of FSMC's compliance with addressing findings.
- ☐ Documentation on RFP/Contract Geographic Preference monitoring.
- ☐ Documentation that district staff with procurement responsibilities for the Child Nutrition Programs completed the following annual procurement training: CSDE's two-day Procurement 101 training or other procurement training.

Procurement Review Organizational Tool (PROT)

Instructions for Uploading Documents to the CNP System

1. Access the CSDE's Connecticut Online Application and Claiming System for Child Nutrition Programs (CNP System) at <https://ct.cnpus.com/prod/Splash.aspx>.
2. Log in with **User ID** and **Password**.



The screenshot shows the login interface for the Connecticut Child Nutrition Programs Online System. The page has a header with the word "Connecticut" and a background image of a landscape. On the left, there is a login box titled "Returning Users: Log On" with fields for "User ID:" and "Password:", a "Forgot Your Password?" link, and a green "Log On" button. A red arrow points to the "Log On" button. To the right of the login box, there are three small illustrations of children playing. Below these, the text reads "CT State Department of Education" and "Child Nutrition Programs Online System". Further down, there are links for "School Nutrition Sponsors", "Child and Adult Care Food Program (CACFP) Sponsors", and "Summer Food Service Program (SFSP) Sponsors". At the bottom, there is a "Links" section with links to "State Department of Education", "CACFP Resources", and "SNP Resources". The footer includes the "CTS COLYAR" logo and the text "Copyright © 2022 Colyar Technology Solutions".

Procurement Review Organizational Tool (PROT)

3. Select **Applications**.



4. Select **Details** under **Actions**.

The screenshot shows a table with the following columns: Actions, Review ID, Review Year, Review Type, Lead Reviewer, Scheduled Date, Closed Date, Nbr of Vendors, and Status. The 'Details' link in the 'Actions' column of the first row is highlighted with a red box and a red arrow. An 'Expand' link is visible in the top right corner of the table.

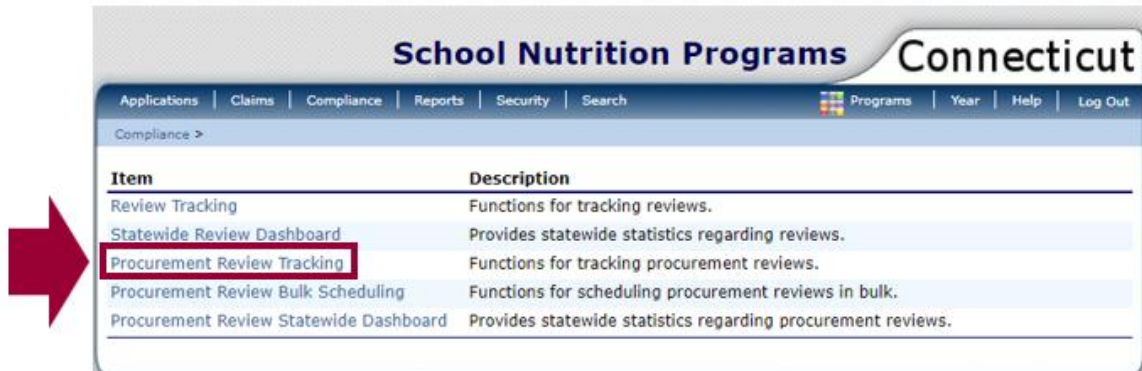
Actions	Review ID	Review Year	Review Type	Lead Reviewer	Scheduled Date	Closed Date	Nbr of Vendors	Status
Details	2172	2023 - 2024	Procurement	Paul, Andrew	11/01/2023		0	Open

5. Select **Compliance**.

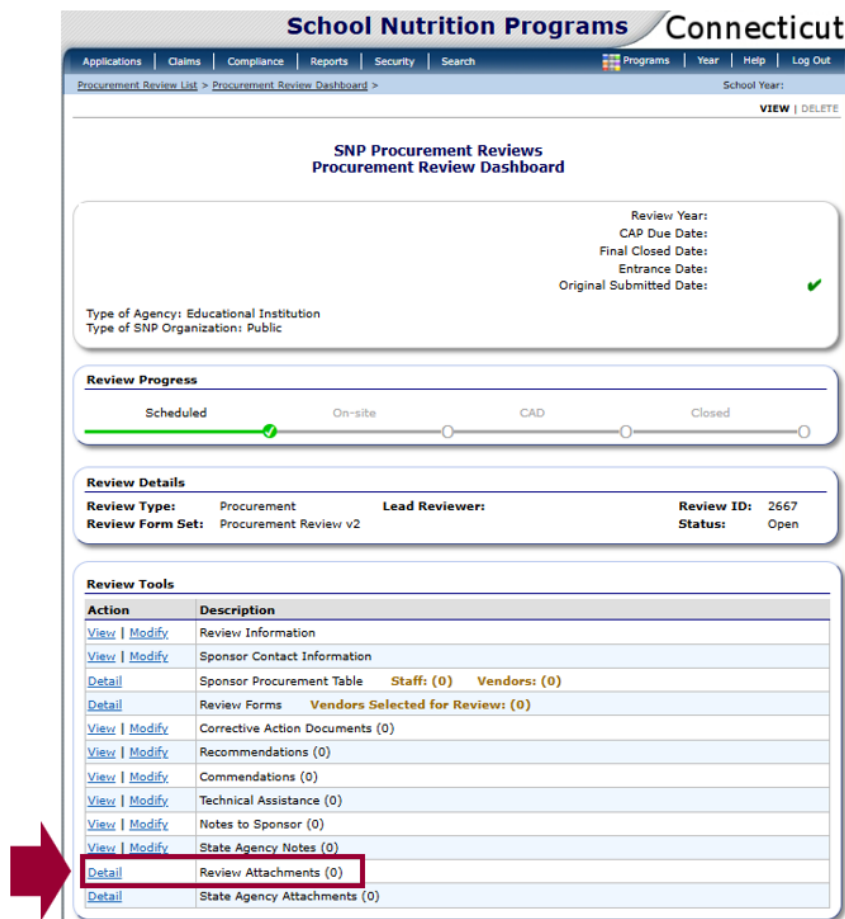


Procurement Review Organizational Tool (PROT)

6. Select **Procurement Review Tracking**.



7. Select **Review Attachments**.



Procurement Review Organizational Tool (PROT)

8. Select **Add Attachment**.

School Nutrition Programs Connecticut

Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out

Procurement Review List > Procurement Review Dashboard > School Year:

SNP Procurement Reviews Attachment List


Type of Agency: Educational Institution
Type of SNP Organization: Public

Attachments

Action	File Name	Description	Date	Category	User
No data to display.					

Total Attachments: 0

< Back **Add Attachment**



Procurement Review Organizational Tool (PROT)

9. Select **Choose File**.

The screenshot displays the 'School Nutrition Programs Connecticut' web application interface. The top navigation bar includes links for Applications, Claims, Compliance, Reports, Security, Search, Programs, Year, Help, and Log Out. The breadcrumb trail shows 'Procurement Review List > Procurement Review Dashboard >'. The page title is 'SNP Procurement Reviews Attachment Detail'. Below the title, there is a section for 'Type of Agency: Educational Institution' and 'Type of SNP Organization: Public'. The 'Attachment Detail' section contains three fields: '1. File To Attach:' with a 'Choose File' button and 'No file chosen' text, '2. Category:' with a dropdown menu, and '3. Description:' with a text area. A red arrow points to the 'Choose File' button. At the bottom, there are 'Save' and 'Cancel' buttons. The page also includes 'VIEW | MODIFY | DELETE' links.

School Nutrition Programs Connecticut

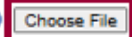
Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out

Procurement Review List > Procurement Review Dashboard > School Year: VIEW | **MODIFY** | DELETE

SNP Procurement Reviews Attachment Detail

Type of Agency: Educational Institution
Type of SNP Organization: Public

Attachment Detail

1. File To Attach:  No file chosen

2. Category:

3. Description:

Save **Cancel**

VIEW | **MODIFY** | DELETE

Procurement Review Organizational Tool (PROT)

10. Choose appropriate document **Category** from drop-down menu.

The screenshot displays the 'School Nutrition Programs Connecticut' web application. The top navigation bar includes links for Applications, Claims, Compliance, Reports, Security, and Search. The main content area is titled 'SNP Procurement Reviews Attachment Detail'. Below this, there are fields for 'Type of Agency: Educational Institution' and 'Type of SNP Organization: Public'. The 'Attachment Detail' section contains three numbered fields: '1. File To Attach:', '2. Category:', and '3. Description:'. A red arrow points to the 'Category:' field, which has a drop-down menu open. The menu lists the following categories: General, SFA Procurement Table, Micro-Purchases, Small Purchase Procurements, Formal Procurements, FSMC, Processing, and Other. The 'Description:' field is empty, and there is an 'Add' button next to it. The bottom right of the form has 'VIEW | MODIFY | DELETE' links.

Procurement Review Organizational Tool (PROT)

11. Enter **Description**.

The screenshot shows the 'School Nutrition Programs Connecticut' web application. The breadcrumb trail is 'Procurement Review List > Procurement Review Dashboard >'. The 'School Year' is set to 'VIEW | MODIFY | DELETE'. The main heading is 'SNP Procurement Reviews Attachment Detail'. Below this, the form displays 'Type of Agency: Educational Institution' and 'Type of SNP Organization: Public'. The 'Attachment Detail' section contains three fields: '1. File To Attach:' with a 'Choose File' button and 'No file chosen' text; '2. Category:' with a dropdown menu; and '3. Description:' with a large text area. A red arrow points to the 'Description' field. At the bottom of the form are 'Save' and 'Cancel' buttons, and a 'VIEW | MODIFY | DELETE' link.

School Nutrition Programs Connecticut

Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out

Procurement Review List > Procurement Review Dashboard > School Year: VIEW | MODIFY | DELETE

SNP Procurement Reviews Attachment Detail

Type of Agency: Educational Institution
Type of SNP Organization: Public

Attachment Detail

1. File To Attach: ? Choose File No file chosen

2. Category: [Dropdown]

3. Description: [Text Area]

Save Cancel

VIEW | MODIFY | DELETE

Procurement Review Organizational Tool (PROT)

12. Select **Save**.

The screenshot displays the 'School Nutrition Programs Connecticut' web application interface. The top navigation bar includes links for Applications, Claims, Compliance, Reports, Security, Search, Programs, Year, Help, and Log Out. Below this, a breadcrumb trail shows 'Procurement Review List > Procurement Review Dashboard >'. The main heading is 'SNP Procurement Reviews Attachment Detail'. A large empty text area is present, with pre-filled text below it: 'Type of Agency: Educational Institution' and 'Type of SNP Organization: Public'. The 'Attachment Detail' section contains three fields: '1. File To Attach:' with a 'Choose File' button and 'No file chosen' text; '2. Category:' with a dropdown menu; and '3. Description:' with a large text area. At the bottom of this section, a red arrow points to a 'Save' button, which is also highlighted with a red box. A 'Cancel' button is located next to it. The bottom right corner of the form has 'VIEW | MODIFY | DELETE' links.

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In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotope, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: <https://www.usda.gov/sites/default/files/documents/ad-3027.pdf>, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or
2. fax: (833) 256-1665 or (202) 690-7442; or
3. email: program.intake@usda.gov

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