

Instructions and Example for Completing Informal Procurement Log

The Informal (small purchase) Procurement Log can to be used to document all bids received as a result of the SFA's solicitation for purchasing products/services costing less than the applicable public or non-public informal/small threshold amount. (Refer to "Federal Funds Procurement Method Selection Chart" or the SFA approved threshold if less. A school will need to solicit at least two and preferably three or more bids in order to achieve competition and to satisfy federal procurement requirements. SFAs will need to document the bids and all other pertinent information discussed with the bidders. SFAs must make certain that all bidders receive the same product specifications. All procurement records must be kept for at least three years from the date the last invoice is paid.

INFORMAL PROCUREMENT LOG - Sample

Supplier Name:		Bob's Company			Mary's Company			Pat's Company		
Items to be Purchased:	Quantity estimated to be purchased	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)
<ul style="list-style-type: none"> <li>Delivery Frequency: <u>weekly</u></li> <li>Bid will be honored for: <u>3 months</u></li> </ul>										
1. Applesauce 6/10 cans	300	15.75	4,725.00	<input type="checkbox"/>	16.50	4,950.00	<input type="checkbox"/>	15.00	4,500.00	<input type="checkbox"/>
2. Pineapple, chunks, 6/10 cans	100	16.25	1,625.00	<input type="checkbox"/>	17.50	1,750.00	<input type="checkbox"/>	18.00	1,800.00	<input type="checkbox"/>
3. Cranberry Sauce 6/10 cans	50	25.25	1,262.50	<input type="checkbox"/>	21.75	1,087.50	<input type="checkbox"/>	23.50	1,175.00	<input type="checkbox"/>
4. Peaches, Freestone, halves, 6/10 cans	300	22.25	6,675.00	<input type="checkbox"/>	21.50	6,450.00	<input type="checkbox"/>	22.75	6,825.00	<input type="checkbox"/>
<b>Total:</b>		\$14,287.50			\$14,237.50			\$14,300.00		
*Bidder Selected (BS)		<input type="checkbox"/>			<input checked="" type="checkbox"/>			<input type="checkbox"/>		
*Bidder Selected (BS); SFA can award all items to one bidder (lowest total price) or award purchase on a line item basis (lowest line item price). SFA will inform bidders which option they will use for awarding the purchase when they are asking for pricing, or can state that either option may be used by the SFA to award the purchase.										
<b>Method of contact:</b> Phone, Fax, Email or In Person		Fax			Phone			In Person		
<b>Name of person providing bid:</b>		Bob			Mary			Pat		
<b>Date contacted:</b>		August 22, 2016; Faxed in bid - Bid sheets attached			August 23, 2016; Price given per phone - Confirmed in writing and attached			August 21, 2016; Visited store and obtained prices - Price sheet attached		
<b>Additional Notes:</b>					Best overall pricing.					
Signature of person completing this form: <i>Bill Carson</i>								Date: <i>August 24, 2016</i>		

**INFORMAL PROCUREMENT LOG AND EVALUATION MATRIX**  
(See Instructions and Example for Completing Informal Procurement Log on reverse)

Supplier Name:										
Items to be Purchased: • Delivery Frequency : _____ • Bid will be honored for: _____ (number of day(s)/week(s)/month(s)) (SFA will state time period)	Quantity estimated to be purchased	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)	Unit Price	Extended Price (Quantity x Unit Price)	*BS (✓)
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
<b>Total:</b>		\$			\$			\$		
*Bidder Selected (BS)		<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
*Bidder Selected (BS); SFA can award all items to one bidder (lowest total price) or award purchase on a line item basis (lowest line item price). SFA will inform bidders which option they will use for awarding the purchase when they are asking for pricing, or can state that either option may be used by the SFA to award the purchase.										
<b>Method of contact:</b> Email/Fax/Mail/In person/Phone										
<b>Name of person quoting pricing:</b>										
<b>Date contacted:</b>										
<b>Additional Notes:</b>										
Signature of person completing this form:								Date:		
<b>Name of bidder selected:</b> _____										
<b>Bidder selected was notified on:</b> _____ (If notification was in writing attach document to the procurement log/evaluation matrix)										
<b>Method of notification:</b> _____ (Email/Fax/Mail/In person/Phone)										