

Instructions and example for Completing Informal Procurement Log

(Purchases costing less than \$150,000)

The Informal Procurement Log can be used to document all bids received as a result of the schools' solicitation for purchasing products/services costing less than \$150,000. A school will need to **solicit at least three bids** in order to achieve competition and to satisfy federal procurement requirements. Schools will need to document the bids and all other pertinent information discussed with the bidders. Schools must make certain that all bidders receive the same product specifications. **All procurement records must be kept for at least five years from the date the last invoice is paid.**

INFORMAL PROCUREMENT LOG

Supplier Name:		Supplier A: Bob's Company			Supplier B: Mary's Company			Supplier C: 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"> • Product specifications • Delivery Frequency: <u>one time delivery</u> • Bid will be honored for: <u>two weeks</u> (school will state time period) 										
1. Applesauce 6/10 cans	30	15.75	472.50	<input type="checkbox"/>	16.50	495.00	<input type="checkbox"/>	15.00	450.00	<input type="checkbox"/>
2. Pineapple 6/10 cans	10	16.25	162.50	<input type="checkbox"/>	17.50	175.00	<input type="checkbox"/>	18.00	180.00	<input type="checkbox"/>
3. Cranberry Sauce 6/10 cans	5	25.25	126.25	<input type="checkbox"/>	21.75	108.75	<input type="checkbox"/>	23.50	117.50	<input type="checkbox"/>
4. Peaches, Freestone, (Halves) 6/10 cans	30	22.25	667.50	<input type="checkbox"/>	21.50	645.00	<input type="checkbox"/>	22.75	682.50	<input type="checkbox"/>
Total:		\$1433.25			\$1423.75			\$1430.00		
*Bidder Selected (BS)		<input type="checkbox"/>			<input checked="" type="checkbox"/>			<input type="checkbox"/>		
*Bidder Selected (BS); school can award all items to one bidder (lowest total price) or award purchase on a line item basis (lowest line item price). School need to tell the bidders which option they will use for awarding the purchase when they are asking for pricing. Schools can state that either option may be used by the school to award the purchase.										
Method of contact: Phone, Fax, Email or In Person		Fax			Phone			In Person		
Name of person providing bid:		Bob			Mary			Pat		
Date contacted:		July 11, 2012; Faxed in bid - Bid sheets attached			July 10, 2012; Price given per phone. - Confirmed in writing and attached			July 13, 2012; Visited store and obtained prices. - Price sheet attached		
Additional Notes:		Bob said their fresh fruit and vegetables are more competitively priced than canned goods.			Best overall pricing; Mary stated that they will have a clearance special going on in October.			Pat said that their delivery costs have gone up recently but that in November they will have a new distributor and pricing.		
Signature of person completing this form: <i>Sam Anderson</i>								Date: <i>July 15, 2012</i>		

INFORMAL PROCUREMENT LOG AND EVALUATION MATRIX

(Purchases costing less than \$150,000)

Supplier Name:										
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"> • Delivery Frequency : _____ • Bid will be honored for: _____ (number of day(s)/week(s)/month(s)) (school will state time period) 				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
1. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
2. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
3. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
4. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
5. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
6. Product name & specification:				<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
Total:		\$			\$			\$		
*Bidder Selected (BS)			<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>	
*Bidder Selected (BS); school can award all items to one bidder (lowest total price) or award purchase on a line item basis (lowest line item price). School need to tell the bidders which option they will use for awarding the purchase when they are asking for pricing. Schools can state that either option may be used by the school to award the purchase.										
Method of contact: Email/Fax/Mail/In person/Phone										
Name of person quoting pricing:										
Date contacted:										
Additional Notes:										
Signature of person completing this form:								Date:		

Name of bidder selected: _____ Bidder selected was notified on: _____ (If notification was in writing attach document to the procurement log/evaluation matrix) Method of notification: _____ (Email/Fax/Mail/In person/Phone)
