The Informal/Small Purchase Log can to be used to document all quotes received as a result of the LEA’s solicitation for purchasing products/services for cost not exceeding the Small Purchase threshold of $150,000 or the more restrictive local district threshold. A school will need to **solicit at least two, preferably three quotes**,in order to achieve competition and to satisfy federal procurement requirements. The LEA will need to document the quotes and all other pertinent information discussed with the bidders. The LEA 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/SMALL PURCHASE LOG - Sample**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Supplier Name:** | | **Bob’s Company** | | | **Mary’s Company** | | | **Pat’s Company** | | |
| Items to be Purchased:   * Product specifications * Delivery Frequency: weekly/4 weeks * Bid will be honored for: 4 weeks (school 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  (✓) |
| 1. Applesauce 6/10 cans | 300 | 15.75 | 4,725.00 | **🞎** | 16.50 | 4,950.00 | **🞎** | 15.00 | 4,500.00 | **🞎** |
| 1. Pineapple 6/10 cans | 100 | 16.25 | 1,625.00 | **🞎** | 17.50 | 1,750.00 | **🞎** | 18.00 | 1,800.00 | **🞎** |
| 1. Cranberry Sauce 6/10 cans | 50 | 25.25 | 1,262.50 | **🞎** | 21.75 | 1,087.50 | **🞎** | 23.50 | 1,175.00 | **🞎** |
| 1. Peaches, Freestone, (Halves) 6/10 cans | 300 | 22.25 | 6,675.00 | **🞎** | 21.50 | 6,450.00 | **🞎** | 22.75 | 6,825.00 | **🞎** |
| **Total:** | | $14,287.50 | | | $14,237.50 | | | $14,300.00 | | |
| \*Bidder Selected (BS) | | **🞎** | | | **☑** | | | **🞎** | | |
| \*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:** | | August 22, 2018; Faxed in bid - Bid sheets attached | | | August 23, 2018; Price given per phone - Confirmed in writing and attached | | | August 21, 2018; Visited store and obtained prices - Price sheet attached | | |
| **Additional Notes:**  Buy American requirements must be followed as found in 7 CFR 210.21(d) and USDA Memo SP38-2017 | | 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: Tommy Joseph | | | | | | | | Date: August 24, 2019 | | |

**INFORMAL/SMALL PRUCHASE LOG AND EVALUATION MATRIX**

**(Purchases not exceeding $150,000 or Local Threshold if less)**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Supplier Name:** | |  | | |  | | |  | | |
| Items to be Purchased:   * Delivery Frequency : \_\_\_\_\_\_\_\_\_\_ * Bid will be honored for: \_\_\_\_\_\_\_\_ (number of day(s)/week(s)/month(s)) (school 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  (✓) |
| 1. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| 2. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| 3. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| 4. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| 5. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| 6. Product name & specification: |  |  |  | 🞎 |  |  | 🞎 |  |  | 🞎 |
| **Total:** | | $ | | | $ | | | $ | | |
| \*Bidder Selected (BS) | | 🞎 | | | 🞎 | | | 🞎 | | |
| \*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:**  Buy American requirements must be followed as found in 7 CFR 210.21(d) and USDA Memo SP38-2017 | |  | | |  | | |  | | |
| 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)