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| **INFORMAL PROCUREMENT CHECKLIST**(Purchase costing less than $250,000) |

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|  | **If Yes check** | **If No check** |
| **Planning Process**  |  |
| * School used an informal procurement log?
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| * Documented justification for purchase (replenish inventory, replacement item, etc.)
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| * Documented the period of time the bid price must be honored (days, weeks, or months)?
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| * Documented general purchasing conditions, product specifications, quality and other non-brand descriptions?
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| * Documented quantities to be ordered or purchased?
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| * Documented any other information needed for the bidder to properly respond?
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| **Solicitation Process** |  |
| * Documented companies contacted for bids (Name of company, Address, and Phone number/fax/email)?
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| * Documented who provided the bid; (name of person)?
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| * Documented method of how companies were contacted (in person, telephone, fax, email or mail)?
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| * Were specifications and date that winning bidder will be selected provided to the company providing the bid?
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| * Was the company provided anticipated date that the product or service be needed?
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| * Documented date the bid was provided?
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| * Was school able to obtain bids from at least three bidders?
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| * Were all bids from responsive and responsible bidders?
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| **Evaluation and Award Process** |  |
| * Was evaluation matrix used?
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| * Was the bidder with the lowest bid awarded the contract/purchase?
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| * If the lowest bidder was not selected; did the school document reasons for selecting a higher bid?
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| **Awarding Contract/Purchase and Contract Management Process** |  |
| * Was the bidder that was selected notified?
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| * Was an order placed within the time frame outlined in the procurement?
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| * Was product or service delivered on time?
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| * Did product or service meet procurement specifications for quality and quantity?
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| * Was a record of this procurement including invoices and payment filed for future audits and record reviews?
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**Additional Informal Procurement Requirements**

* School will need to obtain a **minimum of three bids.**
* It is recommended to get as many bids as possible; at least 4 or 5 bids is recommended.
* Once the school obtains the minimum number of bids, the next step is evaluating the bids using a **pricing matrix**
* Only bidders who are responsive and responsible are eligible for evaluation
	+ **Responsive** bidder is a vendor with a product/service matching specifications outlined in procurement event
	+ **Responsible** bidder is a vendor who is able and willing to provide product or service matching those specifications
* The bidder with the **lowest bid** is selected for the purchase