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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? |  |  |
| * Documented justification for purchase (replenish inventory, replacement item, etc.) |  |  |
| * Documented the period of time the bid price must be honored (days, weeks, or months)? |  |  |
| * Documented general purchasing conditions, product specifications, quality and other non-brand descriptions? |  |  |
| * Documented quantities to be ordered or purchased? |  |  |
| * Documented any other information needed for the bidder to properly respond? |  |  |
| **Solicitation Process** | |  |
| * Documented companies contacted for bids (Name of company, Address, and Phone number/fax/email)? |  |  |
| * Documented who provided the bid; (name of person)? |  |  |
| * Documented method of how companies were contacted (in person, telephone, fax, email or mail)? |  |  |
| * Were specifications and date that winning bidder will be selected provided to the company providing the bid? |  |  |
| * Was the company provided anticipated date that the product or service be needed? |  |  |
| * Documented date the bid was provided? |  |  |
| * Was school able to obtain bids from at least three bidders? |  |  |
| * Were all bids from responsive and responsible bidders? |  |  |
| **Evaluation and Award Process** | |  |
| * Was evaluation matrix used? |  |  |
| * Was the bidder with the lowest bid awarded the contract/purchase? |  |  |
| * If the lowest bidder was not selected; did the school document reasons for selecting a higher bid? |  |  |
| **Awarding Contract/Purchase and Contract Management Process** | |  |
| * Was the bidder that was selected notified? |  |  |
| * Was an order placed within the time frame outlined in the procurement? |  |  |
| * Was product or service delivered on time? |  |  |
| * Did product or service meet procurement specifications for quality and quantity? |  |  |
| * Was a record of this procurement including invoices and payment filed for future audits and record reviews? |  |  |

**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