# INFORMAL PROCUREMENT CHECKLIST

Purchase costing less than $250,000

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| **Planning Process** | **Yes** | **No** |
| SFA used an informal procurement log? |  |  |
| Documented justification for purchase (e.g., 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** | **Yes**  | **No** |
| 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 an anticipated date that the product or service will be needed?  |  |  |
| Documented date the bid was provided? |  |  |
| Was the SFA able to obtain bids from at least two or three bidders? |  |  |
| Were all bids from responsive and responsible bidders? |  |  |
| **Evaluation and Award Process** | **Yes** | **No** |
| Was an evaluation matrix used? |  |  |
| Was the bidder with the lowest bid awarded the contract/purchase? |  |  |
| If the lowest bidder was not selected, did the SFA document reasons for selecting a higher bid? |  |  |
| **Awarding Contract/Purchase and Contract Management Process** | **Yes** | **No** |
| 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? |  |  |

