

Informal Small Purchase Log

(Use this form for purchases with a total aggregate cost of less the simplified purchase threshold that are not micro-purchases.)

CE Name: _____ CE ID: _____ Procurement Year: _____

Technical Specifications	Product(s)/Service(s) to Be Procured:					
	Description:					
	Quantity:			Delivery Frequency/Location(s):		
Contractor/ Supplier Information	Contractor/Supplier Name & Contact Information:		Contractor/Supplier Name & Contact Information:		Contractor/Supplier Name & Contact Information:	
	Contact Date:	Contact Method:	Contact Date:	Contact Method:	Contact Date:	Contact Method:
	Unit Price:	Extended Price:	Unit Price:	Extended Price:	Unit Price:	Extended Price:
	Notes:		Notes:		Notes:	
	<input type="checkbox"/> Check If the Contractor/Supplier Awarded the Contract		<input type="checkbox"/> Check If the Contractor/Supplier Awarded the Contract		<input type="checkbox"/> Check If the Contractor/Supplier Awarded the Contract	

Signature of Person Completing This Form:

Date:

Directions: Informal Small Purchase Log

Purpose

This tool is intended to serve as a log for informal small purchases and as a tool to help contracting entities (CEs) provide the same technical specifications and bid information to all potential bidders. This tool will also help the CE maintain the documentation required to demonstrate compliance with the small purchase regulations.

Directions:

CE Information

Contracting Entity (CE) Name: Record the name of the CE in designated space.

CE Identification Number (CE ID): Record the CE's ID number in the designated space.

Procurement Year: Record fiscal year for the procurement in the designated space.

Technical Specifications

Product(s)/Service(s) to Be Procured: Record the name of the product(s) and/or service(s) to be procured in the designated space.

Description: Record a description of the product(s) and/or service(s) to be procured in the designated space.

Include size, weight, package, or other relevant information that will help the supplier or contractor provide an accurate and competitive bid.

Quantity: Record the quantity or amount to be procured in the designated space.

Delivery Frequency & Locations: Record the how often the CE expects the product(s) and/or service(s) to be delivered and locations of delivery

Contractor/Supplier Information

Contractor/Supplier Name & Contact Information: Record contractor or supplier name and contact information in the designated space.

For the contact information, include the following:

- Name of the company or entity
- Name of the person who provided the bid

Use This Form	
Frequency	As needed, but intended to track a one year cycle.
Required Form Format	Not required.
Record Retention	Public and charter schools are required to keep documentation related to school nutrition programs for five years.
	Private schools, other nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for three years.

- Complete address
- Phone number
- Email (optional if email contact is not used)
- Fax (optional if fax contact is not used)

If more than three contractors or suppliers are contacted, use a second form.

Contact Date: Record the date the contact was made in the designated space. If the contacts occurred over several dates, record all dates.

Contact Method: Record the method used for the contact in the designated space. CEs may use a variety of methods to contact potential bidders including, but not limited to, phone, email, and posted notices.

If the contact was made through multiple methods, record all methods. Be sure to record the information, so the date of the contact is associated with the contact method.

Unit Price: Record bid amount for the contractor or supplier in the designated space.

Extended Price: Record the extended price for the product(s) and/or service(s) in the designated space.

Unit Price	x	Quantity	=	Extended Price
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Notes: Record information about the capability of the contractor or supplier to provide product(s) and/or service(s), and other information relevant to the award of the contract in the space designated for notes.

Be sure to include why the contract was or was not awarded to each bidder in the notes space.

Check If the Contractor/Supplier Awarded the Contract: Record a check in the box under the information for the contractor or supplier awarded the contract.

Signature of Person Completing This Form: Ensure that the person contacting the contractors/suppliers and completing the form signs the form in the designated space.

Date: Record the date the person completing the form signs the completed form in the designated space.

Attach additional documentation as appropriate to this form.