

INFORMAL PROCUREMENT CHECKLIST

(Purchase costing less than \$10,000)

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

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