**Instructions and Example for Completing Informal Procurement Log**

**Not Required for Micro-Purchasing**

**Attachment G1 of *Guidance Memorandum G –***

***Procuring Goods & Services using CACFP Funds***

(Small Purchase Method: purchases costing less than $150,000)

**This *Informal Procurement Log* form can be used to document all bids *(suppliers’ quoted prices)* received or considered for purchasing products/services costing less than $150,000. Instructions and an example of how to document bids are provided below. A blank *Informal Procurement Log* form is provided on the following page.**

When an agency’s purchases equal or exceed $3,500 and are less than $150,000, it must solicit or consider at least three bids/price quotes, but no less than two, in order to achieve competition and to satisfy federal procurement requirements. The lowest price must be selected unless otherwise justified. This information must be documented and retained on file.

* All bidders (potential suppliers) must receive the same product specifications *(agency’s requirements for the products)* or potential suppliers of the same products must be considered.
* Bids or price quotations can be submitted or obtained by email, fax, regular mail, phone, the suppliers’ catalogs, the suppliers’ websites, or in person.
* At minimum, the following information must be documented:

1. The goods/services and quantities to be purchased (including detail of the requirements/specifications); **(2)** the bidders’ or potential suppliers’ names; **(3)** method and date of obtaining price information from each bidder; **(4)** which supplier was selected; and **(5)** if not selected by lowest price, an explanation to justify this selection.

**Example ↓**

**INFORMAL PROCUREMENT LOG and Evaluation Matrix**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Supplier Name:** | | **Supplier A: Bob’s Company** | | | **Supplier B: Mary’s Company** | | | **Supplier C: Pat’s Company** | | |
| **Goods/Services Information (by agency):**   * **Product specifications:** #10 cans of Fruit *(listed below)* * **Delivery Frequency:** one time delivery * **Price quotation will be honored for:** 2 wks | Quantity estimated to be purchased | Unit Price | Extended Price (Quantity x Unit Price) | **\*BS**  **(✓)** | Unit Price | Extended Price (Quantity x Unit Price) | **\*BS**  **(✓)** | Unit Price | Extended Price (Quantity x Unit Price) | **\*BS**  **(✓)** |
| 1. Applesauce 6/10 cans | 30 | 15.75 | 472.50 | **🞎** | 16.50 | 495.00 | **🞎** | 15.00 | 450.00 | **🞎** |
| 1. Pineapple 6/10 cans | 10 | 16.25 | 162.50 | **🞎** | 17.50 | 175.00 | **🞎** | 18.00 | 180.00 | **🞎** |
| 1. Cranberry Sauce 6/10 cans | 5 | 25.25 | 126.25 | **🞎** | 21.75 | 108.75 | **🞎** | 23.50 | 117.50 | **🞎** |
| 1. Peaches, Freestone, (Halves) 6/10 cans | 30 | 22.25 | 667.50 | **🞎** | 21.50 | 645.00 | **🞎** | 22.75 | 682.50 | **🞎** |
| **Total:** | | $1433.25 | | | $1423.75 | | | $1430.00 | | |
| **\*Bidder Selected (BS)** | | **🞎** | | | **☑** | | | **🞎** | | |
| **\*Bidder Selected (BS) → an agency can award or select suppliers by either: selecting 1 supplier for all items (lowest total price) or selecting different suppliers for each item (lowest price per item). Agencies should inform all suppliers which option they will be using for choosing the supplier(s) or that either option may be used.** | | | | | | | | | | |
| **Method of contact: *(****Phone, Fax, Email, In Person, Supplier’s Catalog, or Supplier’s website)* | | Fax | | | Phone | | | In Person | | |
| **Name of person quoting price:** | | Bob | | | Mary | | | Pat | | |
| **Date Submitted/Obtained:** | | May 11, 2016; Faxed in bid - Bid sheets attached. | | | May 12, 2016; Price given per phone. Confirmed in writing and attached. | | | May 16, 2016; Visited store and obtained prices. Price sheet attached. | | |
| **Additional Notes:** | | Bob said their fresh fruit and vegetables are more competitively priced than canned goods. | | | Best overall pricing; Mary stated that they will have a clearance special going on in June. | | | Pat said that their delivery costs have gone up recently but that in July they will have a new distributor and pricing. | | |
| **Signature of person completing this form:** Sam Anderson | | | | | | | | **Date:** May 20, 2016 | | |

[***Guidance Memorandum G - Requirements for Procuring Goods and Services using CACFP Funds (Rev. 10/16)***](http://dpi.wi.gov/sites/default/files/imce/community-nutrition/pdf/gm_g_fdch.pdf)

**Attachment G1 of *Guidance Memorandum G –***

***Procuring Goods & Services using CACFP Funds***

**INFORMAL PROCUREMENT LOG AND EVALUATION MATRIX**

**Not Required for Micro-Purchasing**

**(Purchases less than $150,000)**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Supplier Name:** | | |  | | |  | | |  | | |
| **Goods/Services Information (agency’s info):**   * **Product Description:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   *If Applicable:*   * Delivery Frequency : \_\_\_\_\_\_\_\_\_\_ * Price quotation will be honored for: \_\_\_\_\_\_\_\_ | | **Quantity estimated to be purchased** | **Unit Price** | **Extended Price (Quantity x Unit Price)** | **\*SS**  **(✓)** | **Unit Price** | **Extended Price (Quantity x Unit Price)** | **\*SS**  **(✓)** | **Unit Price** | **Extended Price (Quantity x Unit Price)** | **\*SS**  **(✓)** |
| 1. Product Name & Description: | |  |  |  |  |  |  |  |  |  |  |
| 2. Product Name & Description: | |  |  |  |  |  |  |  |  |  |  |
| 3. Product Name & Description: | |  |  |  |  |  |  |  |  |  |  |
| 4. Product Name & Description: | |  |  |  |  |  |  |  |  |  |  |
| **Total:** | | | $ | | | $ | | | $ | | |
| **\*Supplier Selected (BS)** | | |  | | |  | | |  | | |
| **\*Supplier Selected (BS) → an agency can award or select suppliers by either: selecting 1 supplier for all items (lowest total price) or selecting different suppliers for each item (lowest price per item). Agencies should inform all suppliers which option they will be using for choosing the supplier(s) or that either option may be used.** | | | | | | | | | | | |
| **Method of contact:**  ***(****Email/Fax/Mail/In person/Phone/Supplier’s catalog/Supplier’s website)* | | |  | | |  | | |  | | |
| **Name of person quoting price:** | | |  | | |  | | |  | | |
| **Date Submitted/Obtained:** | | |  | | |  | | |  | | |
| **Additional Notes:** | | |  | | |  | | |  | | |
| **Signature of person completing this form:** | | | | | | | | | **Date:** | | |
| **Name of Supplier Selected**: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | | | | | |
| **Supplier Selected was notified on: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** **(Attach written notifications to this procurement log/evaluation matrix)** | | | | | | | | | | |
| **Method of notification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** *(Email/Fax/Mail/In person/Phone)* | | | | | | | | | | |