The informal procurement log (phone, fax, or email log) can be used to document all bids received as a result of the school's/agency's solicitation for purchasing products/services using the most restrictive of local, state, or federal procurement rules.

* **Federal informal procurement limit is less than $250,000.**
* **State informal procurement limit is less than $25,000 for services and nonperishable (nonfood) items.**
* **Check with your administration or business official for local informal procurement limits.**

A school/agency will need to ask for/receive at least three bids in order to achieve competition and to satisfy federal procurement requirements. Schools/Agencies will need to document the bids and all other important information discussed with the bidders. Schools/Agencies must make sure that all bidders receive the same product specifications (details). All procurement records (financial records, supporting documents, and bids) must be kept for at least three years from the date the last invoice is paid, or until all litigation, claims, or audit findings are closed and three years past that date.

Items to be purchased to include the following information:

* This quote is good For: Each school/agency will state their time period, e.g. nine months, six months, etc. This establishes the timeframe that the bid will be honored.
* Description: Complete Product Specifications see Bid Specification Document on CANS website for more information.
* Delivery Date or Frequency: Each school/agency will state their delivery date or frequency, e.g. weekly delivery, bi-weekly delivery, etc.

Example of completed phone log entry:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | **Distributor 1** | | **Distributor 2** | | **Distributor 3** | |
| **Item** | **Description** | **Quantity** | **Unit Price** | **Delivery Date/Freq** | **Unit Price** | **Delivery Date/Freq** | **Unit Price** | **Delivery Date/Freq** |
| Kellogg's 3800080801 | WG French Toast Minis, Chocolate Chip 1 pouch = 2 OEG, 50% or > whole grains by weight or have whole grains as the first ingredient, less than or equal to 250 calories/portion pack, trans fat 0 gms, less than 280 mg sodium, 1 pouch (100 gms) = 2 OEG, IQF. 72 ct. | 20 cs. | $23.50 | weekly | $ 25.86 | weekly | $24.67 | weekly |

Bidder selected: school can award all items to one bidder (lowest total price) or awarded purchase on a line item basis (lowest line item price). School needs to tell the bidders which option they will use for awarding the purchase when they ask for pricing. Schools can state that either option may be used by the school to award the purchase. Selection must be based on low price based on responsible and responsive bidder.

**Instructions for completing “Phone Quote”**

This form can be saved as a file on the computer and then reused as needed.

There are 4 areas to complete in this document: **1st Section, 2nd Section, 3rd Section, and 4th Section**

**1st Section:** Titled: **“Prepared by” and followed by 3 additional lines**

Prepared by: Write/type your name here (or the person completing the form).

Date prepared: Write/type today’s date

Date quotes due: Write/type the date you need all quotes back

Time quotes due: Write/type the time of day you are requesting all quotes back.

**2nd Section:**

Along the left hand side of this section are 4 areas labeled: “Name of company”, “Company contact”, “Contact phone number”, and “Quote good for”. Running horizontally in this area are 3 areas labeled: Distributor 1, Distributor 2, Distributor 3. All areas will be completed.

**Name of company**: Write/type the company you are contacting for a bid (i.e. Reinhart Foods, Cash-Wa, FSA, etc.). Each company has its own section that you will complete (i.e. Distributor 1, Distributor 2, Distributor 3).

**Company contact**: Write/type the person you are talking to regarding the quote (typically the sales person that services or stops at your SFA).

**Contact phone number**: Write/type the phone number of the person you contacted in the previous line.

**Quote good for**: Write/type the number of days that the company is willing to guarantee the quoted price.

**3rd Section:**

The first 3 columns are where you write/type the bid specifications (item you want to purchase). You may or may not have an item number.

**Item**: Write/type the Manufacturer number.

**Description**: Write/type the bid specifications here.

**Quantity**: Write/type the amount of product you need.

Under Distributor 1, Distributor 2, and Distributor 3, complete the unit price quoted and the delivery frequency of the product (i.e. weekly, monthly, etc.) as you receive them.

**4th Section:**

**Name of Distributor Selected:** Write/type the company awarded the quote

**Signature of school/agency person making bid selection:** write/type the person who made the bid selection (this may or may not be the person who collected the information).

**Date of selection:** Date selection was made (the selection date needs to be after the date the quotes are due by (top section of form).

**General comments:** You may or may not have information to add here. Include any information that affected your bid award.

**Phone Quotes**

**\*\*\*\*\*This is not an order\*\*\*\*\***

Use this form to document requests for price quotes. Request that all quotes be Freight on Board (FOB). Buy American Provision, to the maximum extent practicable, domestic agricultural commodities or products substantially processed in the United States must be purchased. "Substantially" means the final processed product contains over 51% domestically grown agricultural products.

Prepared by:

Date prepared:

Date quotes due:

Time quotes due:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Distributor 1** | **Distributor 2** | **Distributor 3** |
| **Name of company** |  |  |  |
| **Company contact** |  |  |  |
| **Contact phone number** |  |  |  |
| **Quote good for:** | \_\_\_ days | \_\_\_ days | \_\_\_ days |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | **Distributor 1** | | **Distributor 2** | | **Distributor 3** | |
| **Item** | **Description** | **Quantity** | **Unit Price** | **Delivery Date/Freq** | **Unit Price** | **Delivery Date/Freq** | **Unit Price** | **Delivery Date/Freq** |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |
|  |  |  | $ |  | $ |  | $ |  |

­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Distributor Selected Date of selection

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of school/agency person making bid selection

General Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_