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 if you desire examples of product specifications).
* 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 email log entry:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| A. Description | B. Mfg. # | C. Quantity | D. Price Per Unit | E. Total |
| 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.  | Kellogg's 3800080801Equal or better | 20 cs.  | Distributor will complete | Distributor will complete |

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 “Request for E-mail Quote”**

This form can be saved as a file on the computer and then reused as needed. After you complete the document, save the file, and then attach the file to the email.

There are 3 areas to complete in this document: **Part 1, Part 2, and Part 3.**

**Part 1:** Titled: **“**TO: Distributor and FROM: SFA Name”

A. TO: Distributor. Put the cursor on the word *Distributor*. Type the company’s name that you are requesting the quote from.

Tab to B. FROM: SFA Name. Place the cursor on the word *SFA Name*. Type in the School Food Authority name in this blank (i.e. the school district’s name, etc.)

Tab to C. TO: Distributor Contact Person. Place the cursor on the word *Distributor Contact Person*. Type in the name of the person receiving this email.

Tab to D. FROM: SFA Contact Person. Place the cursor on the word *SFA Contact Person*. Type your name here (or the person completing the form).

Tab twice to E. PHONE: SFA Contact Phone Number. Place the cursor on the word *SFA Contact Phone Number*. Type the phone number here.

Tab to: F. Date: Click here to enter a date. On the right hand side, you will see a box with a ˅ that when you click on provides a drop down calendar. Choose today’s date.

**Part 2:**

1. Place the cursor over the Return by email to: “Name”. Type your name here.

2. Place the cursor over the “Time” and type the time (i.e.2:00pm) by which the document should be returned to you.

3. Place the cursor over the works “Click here to enter a date”. On the right hand side, you will see a box with a ˅ that when you click on provides a drop down calendar. Choose the date that the quote is due back to you by.

4. Place the cursor over the e-mail address. Type in the email address that the quote should be returned to.

5. Date that product is needed at SFA. Place the cursor over the works “Click here to enter a date”. On the right hand side, you will see a box with a ˅ that when you click on provides a drop down calendar. Choose the date you need the item(s) in your kitchen.

**Part 3:** Titled: “Description, Quantity, Price per Unit, & Total”

Column A: Place the cursor on “Click here to enter text” and type in the food item you need pricing on.

Column B: Place the cursor over #### and enter the Manufacturer #

Column C: Place the cursor over the #### and type in the amount of product you need.

Column D and E: **NOTE: The “Price per Unit” and “Total” sections of the bottom table will be completed by the Distributor receiving this quote. Distributor will also complete the “Pricing will be held firm for ### days FOB Destination as well as provide an electronic signature.**

Request for E-mail Quote

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

**Part 1**

|  |  |
| --- | --- |
| TO: A. Vendor | FROM: B. SFA Name |
| TO: C. Vendor Contact Person | FROM: D. SFA Contact Person |
| Number of Pages: # of Pages. | PHONE: E. SFA Contact Phone Number |
| Quote good for: (# of days)# of Days/Months | DATE: F. Insert Date |

**Part 2**

**Return by e-mail to** Name  **by** Time **on** Click here to enter a date. **at** e-mail address

**Date that product is needed at SFA:** Click here to enter a date.

**Delivery Address:** Enter Address of Delivery Location

**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.

**Alternate bids** will be considered on products, which meet or exceed products indicated on quote. If bidding alternate items, please include dietary specifications for the product to include: CN Label or Product Formulation Statement, and Nutrition Facts. If these dietary specifications are not included, bid will be considered incomplete.

Distributor is to mark clearly alternate proposals.

Any reference to brand names is meant as descriptive, not restrictive.

**“OR EQUAL”:** any brand name listed in the specifications as “or equal” or “or equivalent” shall establish the minimum requirements for quality, utility, durability, function, purpose, etc. Other product brands may be offered that are equal to or better than the product brand name. Bidder may show cost differences, alternates, and options in the space provided in the quote. This clause is not meant to be restrictive, but to set the minimum standard. AGENCY SHALL DETERMINE, IN ITS SOLE DISCRETION, WHETHER A PRODUCT OFFERED IS “EQUAL”. When the designation is “or equal” or “equivalent” Agency shall make it decision after Bid Closing.

**Part 3:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **A. Description** | **B. Mfg. #** | **C. Quantity** | **D. Price Per Unit** | **E. Total** |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
| Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |
|  Click here to enter text. | ####or equal | #### | $ Price | $ Total Price |

**Award will be made:** Select one: By Line Item, All or Nothing, By Category (be sure to specify categories.

Signature of Distributor and Date (required): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Quote good for: (# of days/months) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_