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 fax 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 3800080801 Equal 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 Fax Quote”**

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

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

A. TO: Distributor. Write the company/vendor name that you are requesting the quote from.

B. FROM: SFA Name. Write the School Food Authority name in this blank (i.e. the school district’s name, etc.)

C. TO: Distributor Contact Person. Write the name of the person receiving this fax.

D. FROM: SFA Contact Person. Write your name here (or the person completing the form).

E. FAX: Distributor Fax #. Write the distributor fax phone number here.

F. PHONE: SFA Contact Phone Number. Write the phone number here of person who can answer questions about the product requested.

G. Number of Pages. Write the number of pages in this document.

H. Date: Click here to enter a date. Write today’s date.

I. Quote good for: ## days. **Distributor will complete.**

**Part 2:**

1. Return to: “Name”. Write the name of person who fax should be returned to.

2. Write the time (i.e.2:00pm) the document should be returned by.

3. Write the date that the quote is due back by.

4. Write the fax number that quote should be faxed back to.

5. Date that product is needed at SFA. Choose the date you need the item(s) in your kitchen.

**Part 3:** Titled: “Description, Mfr. #, Quantity, Price per Unit, & Total

Column A: Write in the food item/bid specification you are requesting pricing on.

Column B: Write in the manufacturer number if available or for reference.

Column C: Write the amount of product you are requesting.

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 “Quote good for (# of days). Distributor must sign on Signature of Distributor line before returning to the SFA.**

**Request for Fax Quote**

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

**Part 1**

|  |  |
| --- | --- |
| TO: (Distributor) | FROM: (SFA Name) |
| TO: (Distributor Contact Person) | FROM: (SFA Contact Person) |
| FAX: (Distributor) | PHONE: (SFA Contact Person Phone #) |
| Number of Pages: | Date: (Today’s Date) |
| Quote good for: (# of days) |  |

**Part 2**

**Return to (Name)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ by (time)\_\_\_\_\_\_\_\_\_\_\_\_\_ on (date)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to**

**(fax number)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date that product is needed at SFA:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Delivery Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**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 |
|  |  |  |  |  |
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|  |  |  |  |  |

**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) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_