Small Purchase Log

*Use this form for CSFP and TEFAP purchases with a total aggregate
cost of less than the simplified purchase threshold that are not micro-purchases.*

CE Name: _____   **Procurement Year:** _____

Technical Specifications	**Product(s)/Service(s) to Be Procured:**				
	Description:				
	Quantity:			**Delivery Frequency/Location(s):**	
Contractor/ Supplier Information	**Contractor/Supplier Name & Contact Information:**		**Contractor/Supplier Name & Contact Information:**		**Contractor/Supplier Name & Contact Information:**
	Contact Date:	**Contact Method:**	**Contact Date:**	**Contact Method:**	**Contact Date:**	**Contact Method:**
	Unit Price:	**Extended Price:**	**Unit Price:**	**Extended Price:**	**Unit Price:**	**Extended Price:**
	Notes:		**Notes:**		**Notes:**
	☐ **Check if the Contractor/Supplier Was Awarded the Contract**		☐ **Check if the Contractor/Supplier Was Awarded the Contract**		☐ **Check if the Contractor/Supplier Was Awarded the Contract**

Signature of Person Completing This Form: **Date:**

_____   _____

Directions: Small Purchase Log

Purpose

This tool is intended to serve as a log for small purchases and as a tool to help contracting entities (CEs) provide the same technical specifications and bid information to all potential bidders. This tool will also help the CE maintain the documentation required to demonstrate compliance with the small purchase regulations.

Use This Form	
Frequency	As needed, but intended to track a one year cycle.
Required Form Format	Not required.
Record Retention	CEs are required to keep documentation for three years.

Directions:

CE Name: Record the name of the CE in designated space.

Procurement Year: Record fiscal year for the procurement year in the designated space.

Technical Specifications

Product(s)/Service(s) to Be Procured: Record the name of the product(s) and/or service(s) to be procured.

Description: Record a description of the product(s) and/or service(s) to be procured.

Include size, weight, package, or other relevant information that will help the supplier or contractor provide an accurate and competitive bid.

Quantity: Record the quantity or amount to be procured.

Delivery Frequency & Locations: Record how often the CE expects the product(s) and/or service(s) to be delivered and locations of delivery.

Contractor/Supplier Information

Contractor/Supplier Name & Contact Information: Record contractor or supplier name and contact information.

For the contact information, include the following:

– Name of the company or entity

– Name of the person who provided the bid

– Complete address

– Phone number

– Email (optional if email contact is not used)

– Fax (optional if fax contact is not used)

If more than three contractors or suppliers are contacted, use a second form.

Contact Date: Record the date the contact was made. If the contacts occurred over several dates, record all dates.

Contact Method: Record the method used for the contact. CEs may use a variety of methods to contact potential bidders including, but not limited to, phone, email, and posted notices.

If the contact was made through multiple methods, record all methods. Be sure to record the information, so the date of the contact is associated with the contact method.

Unit Price: Record bid amount for the contractor or supplier.

Extended Price: Record the extended price for the product(s) and/or service(s) in the designated space.

$$\boxed{\text{Unit Price}} \times \boxed{\text{Quantity}} = \boxed{\text{Extended Price}}$$

Notes: Record information about the capability of the contractor or supplier to provide product(s) and/or service(s), and other information relevant to the award of the contract.

Be sure to include <u>why</u> the contract was or was not awarded to each bidder in the notes space.

Check If the Contractor/Supplier Was Awarded the Contract: Record a check in the box under the information for the contractor or supplier who was awarded the contract.

Signature of Person Completing This Form: Ensure that the person contacting the contractors/suppliers and completing the form signs the form.

Date: Record the date the person completing the form signs the completed form.

Attach additional documentation as appropriate to this form.