|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Small Purchase Log**  *(Use this form for purchases with a total cost of less than the simplified purchase threshold that are not micro-purchases.)* | | | | | | | | | |
| **CE Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | **CE ID:  \_\_\_\_\_\_\_\_\_\_\_\_\_** | | **Program Year:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | |
| **Technical Specifications** | **Product(s)/Service(s) to Be Procured:** | | | | | | | | |
| **Description:** | | | | | | | | |
| **Quantity:** | | | | **Delivery Frequency/Location(s):** | | | | |
| **Vendor/ Supplier Information** | **Vendor/Supplier Name & Contact Information:** | | **Vendor/Supplier Name & Contact Information:** | | | | **Vendor/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 Vendor/Supplier Is Selected** | | **□ Check If the Vendor/Supplier Is Selected** | | | | **□ Check If the Vendor/Supplier Is Selected** | | |
|  | | | | | | | | | |
| **Signature of Authorized Representative of the CE:** *I attest that this information is true, accurate, and complete to the best of my knowledge.* | | | | | | | | **Date:** | |
| **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | | | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | |

**Directions: Small Purchase Log**

|  |  |
| --- | --- |
| **Use This Form** | |
| **Frequency** | As needed, but intended to track a one-year cycle of purchases. |
| **Required Form Format** | Not required. |
| **Record Retention** | Public and charter schools are required to keep documentation related to school nutrition programs for five years.  Private schools; independent child or adult care centers; sponsors of day care homes, child care centers, or adult day care centers; nonprofit sponsors of summer meals sites; and residential child care institutions (RCCIs) are required to keep documentation for three years. |

**Purpose**

This tool is intended to serve as a log for informal 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.

All small purchases must comply with federal, state, and local procurement requirements. See the following for information on compliant procurement and small purchases.

* School Nutrition Programs: *Administrator’s Reference Manual, Section 17, Procurement*.
* Community Programs: *Complete CACFP Handbook, Section 7000, Financial Management* and *TDA Supplemental SFSP Handbook, Chapter 6, Procurement and Bid Procedures*.

**Directions:**

***CE Information***

**Contracting Entity (CE) Name:** Record the name of the CE in designated space.

**CE Identification Number (CE ID):** Record the CE’s ID number in the designated space.

**Program Year:** Record Program year for the procurement 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 in the designated space.

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

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 in the designated space.

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

***Vendor/Supplier Information***

**Vendor/Supplier Name & Contact Information:** Record vendor or supplier name and contact information in the designated space.

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 in the designated space. If the contacts occurred over several dates, record all dates.

**Contact Method:** Record the method used for the contact in the designated space. 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 vendor or supplier in the designated space.

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Unit Price | x | Quantity | = | 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 in the space designated for notes.

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

**Check If the Vendor/Supplier Is Selected:** Record a check in the box under the information for the vendor or supplier that was selected.

**Signature of Authorized Representative of the CE:** Ensure that the authorized representative of the CE contacting the vendor/suppliers and completing the form signs the form in the designated space.

**Date:** Record the date the person completing the form signs the completed form in the designated space.

Attach additional documentation as appropriate to this form.