**Small Purchase Template AND EVALUATION MATRIX**

**(Purchases costing less than $250,000 or lower local purchasing threshold. If different: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Vendor (Bidder) Name:** | |  | |  | |  | |
| **Name of person providing bid:** | |  | |  | |  | |
| **Vendor Contact Information - Address:** | |  | |  | |  | |
| **Phone Number:** | |  | |  | |  | |
| **Email:** | |  | |  | |  | |
| **Website:** | |  | |  | |  | |
| **Method of contact:** | | **Email/Fax/Mail/In person/Phone** | | **Email/Fax/Mail/In person/Phone** | | **Email/Fax/Mail/In person/Phone** | |
| **Date vendor provided bid:** | | **\_\_\_\_ / \_\_\_\_ / \_\_\_\_** | | **\_\_\_\_ / \_\_\_\_ / \_\_\_\_** | | **\_\_\_\_ / \_\_\_\_ / \_\_\_\_** | |
| **Bid Requirements:**   * Delivery Frequency: \_\_\_\_\_\_\_\_\_\_ * Bid pricing must be good for: \_\_\_\_\_\_\_\_   (Number of day(s)/week(s)/month(s)) (school will state period of time)   * Attached Terms and Conditions | Quantity To Be Ordered | Unit Price | Extended Price  (Quantity  x Unit Price) | Unit Price | Extended Price  (Quantity  x Unit Price) | Unit Price | Extended Price  (Quantity  x Unit Price) |
| 1. Product Name:  (Specifications Attached) |  |  |  |  |  |  |  |
| 2. Product Name:  (Specifications Attached) |  |  |  |  |  |  |  |
| 3. Product Name:  (Specifications Attached) |  |  |  |  |  |  |  |
| 4. Product Name:  (Specifications Attached) |  |  |  |  |  |  |  |
| **Total Bid:** | | $ | | $ | | $ | |
| Lowest Vendor Bid (Check Box)  \*If lowest bid is not selected provided justification in the Additional Notes section. | | 🞎 | | 🞎 | | 🞎 | |
| **Vendor selected was notified on**:  If notification was in writing attach document to this form for school procurement records. | |  | |  | |  | |
| **Method of notification to winning vendor**: | | **Email/Fax/Mail/In person/Phone** | | **Email/Fax/Mail/In person/Phone** | | **Email/Fax/Mail/In person/Phone** | |
| **Additional Notes:** | |  | |  | |  | |
| Name of person completing this form: | | | | | | Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_** | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Example of Micro-purchase Tracking Log** | | | | |
| **Name of SFA:** | | | | |
| **School Year:** | | | | |
| **Micro-purchasing Category:**  (Examples: Local products, Farm 2 School, FFVP, office supplies, fresh fruits & vegetables, beef, chicken, and others) | | | | |
| **All purchases (transactions) using the Micro-purchase method must be less than $10,000 or lower of local threshold: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**  **All purchase prices must be reasonable and should be spread equitably among vendors.** | | | | |
| **Vendor Names:** |  |  |  |  |
| **Cycle One** | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: |
| **Cycle Two** | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: |
| **Cycle Three** | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: |
| **Cycle Four** | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: |
| **Cycle Five** | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: | **Micro-purchase Information**  Date: **\_\_\_\_ / \_\_\_\_ / \_\_\_\_**  Total Cost: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Product(s) Purchased: |
| **Total Spend with each Vendor:** | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Was total spend with all vendors spread-out equitably? Yes or No.  If not, adjust future micro-purchase to ensure purchases are spread fairly across all vendors. | | | | |
| **Note**: Spend across all vendors will never be exact, but SFA should make the attempt. Other conditions play a role in fairly spreading purchases across all vendors such as “reasonable price”. Reasonable price must always be considered when making a micro-purchase. The SFA will determine if the price is considered reasonable. | | | | |