

INFORMAL PROCUREMENT CHECKLIST

Planning Process	Yes	No
Sponsor used an informal procurement log?		
Documented justification for purchase (e.g., replenish inventory, replacement item, etc.)		
Documented the period-of-time the bid price must be honored (days, weeks, or months)?		
Documented general purchasing conditions, product specifications, quality, and other non-brand descriptions?		
Documented quantities to be ordered or purchased?		
Documented any other information needed for the bidder to properly respond?		
Solicitation Process	Yes	No
Documented companies contacted for bids (name of company, address, and phone number/fax/email)?		
Documented who provided the bid (name of person)?		
Documented method of how companies were contacted (in person, telephone, fax, email, or mail)?		
Were specifications and date that winning bidder will be selected provided to the company providing the bid?		
Was the company provided an anticipated date that the product or service will be needed?		
Documented date the bid was provided?		
Did the Sponsor request bids from at least three bidders?		
Were all bids from responsive and responsible bidders?		
Evaluation and Award Process	Yes	No
Was an evaluation matrix or standard scoring criteria used?		
Was the bidder with the lowest bid awarded the contract/purchase?		
If the lowest bidder was not selected, did the Sponsor document reasons for selecting a higher bid?		
Awarding Contract/Purchase and Contract Management Process	Yes	No
Was the bidder that was selected notified?		
Was an order placed within the time frame outlined in the procurement?		
Was product or service delivered on time?		
Did product or service meet procurement specifications for quality and quantity?		
Was a record of this procurement including invoices and payment filed for future audits and record reviews?		