

Small Purchases Checklist

	Yes	No
Planning Process		
Review criteria and confirm purchase meets small purchase criteria.		
Document justification of purchase.		
Write clear concise specifications (description, quantity, fees, and services).		
Follow district, state, and federal guidelines and procedures.		
Document any other information needed for the bidder to properly respond.		
Determine a minimal of three potential vendors.		
Develop matrix to document responses.		
Solicitation Process Documentation		
Identify companies contacted for bids (name of company, address, and phone number/fax/email).		
Identify individual's name submitting quote and date submitted.		
Identify how companies were contacted (in person, telephone, fax, email).		
Identify when quotes are due and selection date of vendor.		
State the time period the bid price must be honored.		
State the time period the bid price must be submitted and when product or services will be needed by in the district.		
Confirm district received quotes from at least three vendors.		
Identify responsive and responsible vendors and provides justification if vendor is not responsive or responsible.		
Quote Evaluation Award Documentation		
Evaluate only responsive and responsible vendors.		
Use an evaluation matrix.		
Select the bidder with the lowest bid and award the contract/purchase.		
Justify if the lowest bidder was not selected; and document reasons for selecting a higher bid.		
Contract Management Documentation		
Notify selected vendor.		
Place order within the timeline.		
Ensure terms and conditions of contracts are met.		
Keep all planning, solicitation, quote award, contract management documents.		
Keep all invoices and payment records.		