**Small Purchase Procurement Worksheet**

***Step 1: Tell us about your project.***

|  |  |
| --- | --- |
| Applicant/Grantee Organization: |  |
| Project/Program Name: |  |
| Contact Person: |  |
| Estimated Start Date: |  |
| Project Description: |  |

***Step 2: What are your organization’s policies and procedures for purchasing goods and services?***

|  |  |
| --- | --- |
| Does your organization have written policies & procedures? | 🞏 Yes 🞏 No |
| If yes, please attach a copy of your policies and procedures. If no, please contact the ROI READI project manager for guidance on how to proceed. | |

***Step 3: Who provided you with a quote?***

|  |  |  |
| --- | --- | --- |
| **Vendor Name:** | **Contact Information (phone/email):** | **Date of Quote:** |
|  |  |  |
|  |  |  |
|  |  |  |

**Did you contact them via: 🞏** Email 🞏 Letter 🞏 Fax  
Please attach a copy of the solicitation and quote.

***Step 4: Is the vendor a Disadvantaged Owned Business Enterprise (DBE)?***

Check the State of Indiana Disadvantaged Owned Business Enterprise list at <https://entapps.indot.in.gov/DBELocator/>

|  |  |
| --- | --- |
| DBE Certified: | 🞏 Yes 🞏 No |

**Step 5: Is the vendor eligible to work on federally funded projects in the System for Award Management (SAM) system?**

|  |  |
| --- | --- |
| Did you check [www.sam.gov](http://www.sam.gov) for eligibility? | 🞏 Yes 🞏 No |
| How to Search [www.sam.gov](http://www.sam.gov):   1. **Sign into Sam.gov.** If you do not have a SAM account, see below. 2. Select Search from the menu 3. Under Select Domain, click on Entity Information 4. Under Entity Information, click on Exclusions 5. Under Keyword Search, click on Excluded Individual or Excluded Entity 6. Type in Entity name and hit return 7. On the top right side, click on Actions and then click Download 8. Select pdf and click on Download 9. Print, sign and date document and attach to this document   ***If you do not have access to SAM.gov, please contact the ROI READI Project Manager for assistance.*** | |

***Step 6: What criteria did you use to select the vendor?***

|  |
| --- |
| (i.e. low cost, best value based on X, able to meet timeline, only one available etc.) |

**Step 7: Is there any other information that we should know?**

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|  |

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Printed Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\*Please keep a copy of this form for your records.**

**Please contact the READI Project Manager with any questions.**

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