



California Fire & Rescue Training Authority, Sacramento

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Governing Council

Deputy Chief Rod Chong, Chairperson
Fire Chief Kim Zagaris
Director Grant B. Goold

Sacramento Fire Department
Governor's Office of Emergency Services
Sacramento Metropolitan Fire District

David M. Baltzell
Executive Director

Informal Bid Award Form

Purchases greater than \$5,000 and less than \$50,000 require an informal bid process unless authorized by General Counsel. Projects shall not be broken into several smaller projects to circumvent the Informal Bid criteria. This form shall be filled out for all informal bid awards following the instructions at the bottom of this form.

Vendor Bid Summary: Enter the requested information for all bids received (minimum of 3 required unless approved by District Counsel).

Vendor :
Bid Amount:
Comments:

Budget Officer Purchase Recommendation:

Vendor : Enter the name of the recommended vendor.

Bid Amount: Enter the amount of the recommended vendor's bid.

Lowest Bidder: Yes If yes, award bid, sign and forward documentation to Finance for filing.

No If no, forward to General Counsel for decision.

Justification: Justification for the bid award or reason for forwarding to General Counsel, as well as acknowledgement of personal/business ties with the recommended vendor if applicable, is mandatory.

Budget Officer Signature

Date

District Counsel Signature

Date

Purchase Order #:

Entered by the Finance

06/14/06

Informal Bid Award Form Instructions

Disclaimer: Budget Officers are authorized to award the bid to the lowest bidder provided the project is authorized, sufficient money exists in the budget and appropriate purchasing procedures are followed. If the Budget Officer recommends a vendor other than the lowest bidder, less than three (3) bids are received, the purchase will be made off an existing contract, etc., justification needs to be provided in the "Budget Officer Purchase Recommendation" section of the form. In this case the purchase is not authorized until approval is received from District Counsel.

Process

Vendors are required to submit a written bid from the information posted on the "Informal Bid Request Form." Once vendor bids are received by the date, time and location indicated the Budget Officer will evaluate the bids using the "Informal Bid Award Form."

Form Instructions: The following instructions apply to the gray areas of the "Informal Bid Award Form" in the order they appear. These gray fields will expand to accommodate the amount of information entered:

"Vendor Bid Summary" Section

- Vendor: Enter the name of the vendor submitting a bid.
- Bid Amount: Enter the amount of the submitted bid.
- Comments: Provide any comments that may be relevant to the qualifications – this is especially important if the recommendation is to select a vendor other than the lowest bidder.

Note: Repeat this process for each vendor submitting bids. If more bids are received than the form can accommodate, create a second form and continue.

"Budget Officer Purchase Recommendation" Section

- Vendor: Enter the name of the recommended vendor.
 - Bid Amount: Enter the amount of the recommended vendor's bid.
 - Lowest Bidder – If Yes - Check this box and send all documentation to the Finance Division for filing. Proceed with the purchase using appropriate purchasing procedures.
 - Lowest Bidder – If No - Check this box and forward to District Counsel for evaluation. Reasons for not selecting the lowest bidder may be: less than three bids received, making the purchase off an existing contract, quality control problems with the vendor, etc.
 - Justification: Provide justification for the recommendation. Justification comments are mandatory for all informal bid awards/recommendations. If recommending making a purchase off an existing contract, include the contract number.
 - Budget Officer Signature/Date: Sign, date and forward to the Finance or District Counsel as directed above.
 - General Counsel Signature/Date: As required by this policy, General Counsel will evaluate the Budget Officer's recommendation and provide direction. District Counsel will complete the Informal Bid Award Form as required and forward to the Finance for filing.
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- Purchase Order #: This information is provided by the Finance.