Department Quote Checklist Form

Department_________________ Requisition # ______________ Date: _______

Informal and Formal Bid Thresholds

Each biennium, the Office of Financial Management (OFM) adjusts the purchasing limits of informal and formal bid thresholds to reflect inflationary trends. The new adjustment has been made. Here are the changes that begin July 1, 2009:

- Purchase contracts for goods and services that are projected to be between $3,500 and $49,000 will be categorized as an informal bid opportunity. This does not apply to goods and services that are under state contract.
- Purchase contracts for information technology purchases (DIS) that are projected to exceed $10,000 must go through the IT competitive process. This does not apply to IT purchases that are under state contract.
- Purchase contracts projected to exceed $49,000 will be categorized as formal bid opportunities. This does not apply for purchases that are under state contract.

Purchases up to $3,500 may be made without competitive bids based on buyer experience and knowledge of the market.

Effective July 26, 2009, state agencies and higher education institutions must use Washington Electronic Business Solutions (WEBS) as Washington’s common vendor registration and bid notification system. Both formal and informal competitive solicitations need to be posted on WEBS. The posting of informal bids on WEBS is designed to encourage greater participation by small businesses.

Telephone quotes will no longer be permitted. All quotes must be processed by purchasing.

The following is information that Purchasing needs in order to complete your request. To assist in the quoting process please answer the questions below on a separate sheet of paper and submit with checklist.

- Identify the product that is needed.
- Please provide a detailed itemized list of items and their quantities?
- Are alternate items ok?
- When does the department want the item delivered?
- Where does the department want the item delivered?
- Please provide at least 3 potential vendors that can provide the product(s) your department needs. Please include the vendor’s name, address, phone number, fax number, and date.
- Complete a purchase requisition, which includes the above information and send to Purchasing at 218 Tawanka Hall.
The following are items to consider for the quoting process. If you answer yes to any of the following questions, please answer the question on an attached piece of paper and submit with checklist.

☐ Can a EWU department provide the product or service instead of a vendor? If so, please contact the department to assist you.

☐ If delivered to department, how large is item? Can the item(s) be delivered without a dock delivery?

☐ Does the item require installation? Can a EWU Department perform the installation? Should it be included on the quote?

☐ Does department require specific terms? Does it require a maintenance agreement term? Trade in term? Warranty?

☐ Will there be any special criteria for evaluating the bids besides cost? Quality? Non Cost Factors?

☐ Is the description of the item clear enough for a supplier to understand what they are bidding on? Do we need additional specifications?

☐ Are the model numbers or names of the items specific to a company that the department has provided? If so, please identify the vendor.

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<th>Requester: ____________________</th>
<th>Approved: ____________________</th>
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<tr>
<td>Department: ____________________</td>
<td>Expenditure Approval</td>
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<td>Phone: _________________________</td>
<td>VP / Dean / Admin. Head / Grants Admin.</td>
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