CHECKLIST

The following checklist is to serve as a guide through the various steps of the procurement process:

☐ VDR 204 or W9 (for new vendors)
☐ Apply sale tax, delivery, and other applicable fees
☐ D11
☐ IT Authorization
☐ Vendor Insurance
☐ Authorized signature and date (two signatures for requests over $3,000)
☐ Valid Quote (with a minimum 30-day expiration date)
☐ Three or more information quotes in writing (Only for purchases totaling $25,000 to $50,000)
☐ Attached Unsigned Contract/Agreement (made to CSFPF)
☐ Attached Unsigned Contract/Agreement (made to CSFPF and CSUF) of $5,000 and above, and/or fall under specific conditions/requirement
☐ Other Supporting Documentation (which may help explain/justify the expenditure)
☐ Submit Form and Supporting Documentation to CSFPF (CP-830)

For additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website: http://foundation.fullerton.edu/policies-forms/