

## 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/>***