



INFORMAL PROPOSAL CHECKLIST

This checklist is to be used for documenting an informal proposal process in satisfaction of the competition requirements for Goods, Services and Information Technology in accordance with the ICSUAM Sections 5301, 5401, and 5501* revised 11/03/2014. This completed checklist and supporting documentation must be submitted before an agreement can be initiated. [*http://www.calstate.edu/icsuam/documents/Section5000.pdf](http://www.calstate.edu/icsuam/documents/Section5000.pdf)

OPTION 1: DVBE/SMALL BUSINESS OPTION: MAXIMUM THRESHOLD \$250,000

*(Applies to Goods, Services, IT)***

Obtain price quotations from two or more certified Small Business (SB) OR two or more Disabled Veterans Businesses Enterprises (DVBE). A written product specification/project scope is required when contacting vendors. Written vendor proposals are preferred. For verbal responses, complete the Verbal Proposal Verification Form.

List the vendor names and check whether DVBE or SB. It must be either/or (both SB or both DVBE).

Vendor Name	DVB	Small Business	Selected Vendor

Please attach:

1. Specifications/Scope of Work
2. Vendor proposals or Verbal Proposal Verification form

Comments/Required explanation if selected vendor is not the lowest bid:



OPTION 2: ACQUISITION COST BETWEEN \$50,000 AND \$100,000

(Applies to Non-IT Goods and Services)**

A minimum of three proposals must be obtained. Written product specification/project scope is required to be sent to the vendors. Written vendor proposals are preferred. For verbal responses, complete the Verbal Proposal Verification form.

Table with 3 columns: Vendor Name, Quoted Price, Selected Vendor

Please attach:

- 1. Specifications/Scope of Work
2. Vendor proposals or Verbal Proposal Verification form

Comments/Required explanation if selected vendor is not the lowest bid:

Large empty rectangular box for comments.



OPTION 3: ACQUISITION COST BETWEEN \$50,000 AND \$500,000

*(Applies to Information Technology Goods and Services)***

A minimum of three proposals must be obtained. Written product specification/project scope is required to be sent to the vendors. Written vendor proposals are preferred. For verbal responses, complete the Verbal Proposal Verification Form. Compliance with the CSU Accessible Technology Initiative (ATI) is required. If no proposal is fully compliant, award shall be made to the proposal that demonstrates greatest compliance. Exceptions must be appropriately approved and documented. For information, procedures and required forms visit <http://www.sfsu.edu/access/>

Vendor Name	Quoted Price	Selected Vendor

Please attach:

1. Specifications/Scope of Work
2. Vendor proposals or Verbal Proposal Verification form

Comments/Required explanation if selected vendor is not the lowest bid:

**** NOTE FOR OPTIONS 2 AND 3:**

If less than three responses are received, Requester must document that sufficient outreach and diligence was undertaken before requesting that Procurement waive the requirement for three responses. Contracts shall be awarded based on the proposal that provides the best value to the University's requirements. If the award is other than to the lowest priced proposal, the Requester must document the value-based determination for requesting award to a higher priced proposal.



Signature of Requester

Date

Signature of Approver

Date

Name:

Name:

Title:

Title:

Dept.:

Dept.:

Approval of Vendor Selection (*Procurement Comments*):

Large empty rectangular box for providing procurement comments.

Signature of Procurement

Date

Name:

Title:

Dept: