

## Informal Quote Checklist

(\$10,000-\$149,999.99)

**Description:** For all purchases over \$10,000, university purchasers are required to get competitive quotes. The informal quote process can be done by departments. Guidance can be provided by P2P as needed. Steps one through seven may be used for revenue generating requests.

**Methods:** Informal Quotes are to be done in writing, and all correspondence documented. The final purchase should be submitted as a requisition in eSHOP.

**Date last edited:** September 21, 2022

### Checklist

#### 1) Write a Scope of Work and any other documentation

- a) Include details such as the requirements of the product or services to be provided by the supplier. Consider including the following:
  - i) Project objectives
  - ii) Project scope
  - iii) Major deliverables
  - iv) Tasks that support the deliverables and which party will complete them
  - v) Timeline for completion of work, required delivery dates
  - vi) Location of work and resources, equipment and facilities needed
  - vii) Payment, costs, term, and deadlines
  - viii) Criteria to determine success of deliverables
- b) Ensure that the specifications in the scope of work will produce an apples-to-apples comparison.
- c) If suppliers will be evaluated on criteria aside from pricing, develop a supplier response document that includes any questions suppliers will answer to assist with scoring review.

**NOTE:** Any supplier who helps develop the specifications is ineligible to bid.

#### 2) Send Invitation to Quote email to suppliers

- a) Send an identical email to all suppliers to request an informal quote/bid.
- b) Use BCC so that suppliers cannot see the other invited suppliers.
- c) Use the subject line: "Univ. Of Nebraska XXX– Description – Deadline for Response"
- d) Attach Scope of Work and any other response documentation (section 1)
- e) Provide a timeline (including time and time zone) in the body of the email:
  - i) deadline for supplier submission of questions
  - ii) deadline for final supplier response submission
- f) Include criteria for supplier selection.
  - i) lowest responsible bidder (lowest priced supplier who meets all criteria of the Scope of Work and responds within the stated.  
-or-
  - ii) Predetermined, objective non-biased criteria. Supplier response document should be included (section 1.c).

#### 3) Documentation

- a) After sending the email (section 2), save a pdf copy of the email to document to whom the Request for Quotation was sent.

#### 4) Questions & Answers

- a) Answers to all supplier questions submitted by deadline (section 2.e.i) should be provided to all bidders in email format.

**5)Evaluation**

- a) Verify suppliers who have submitted responses are responsible respondents
  - i) Supplier response was submitted by submission deadline (section 2.e.ii)
  - ii) Supplier response meets all stated requirements of the Scope of Work
- b) Score supplier responses based on criteria outlined (section 2.f)

**6)Intent to Award**

- a) Once the awardee has been determined, send an email to all bidders using the following language:

*“ This is to notify all Bidder(s) who responded to this quote opportunity that the University intends to enter into negotiations with (Company Name). The awardee indicated in this message shall not commence any billable work until a contract has been fully executed by both parties and/or a Purchase Order has been issued by the University. We thank you for your continued interest in the University of Nebraska.”*

**7)Certificate of Insurance**

- a) If the supplier or their subcontractor will be performing work on campus, it is the department's responsibility to ensure that the supplier's Certificate of Insurance is kept on file and updated for the entire length of the project.

**8)Purchase Order**

- a) Submit a purchase requisition in eSHOP
  - i) Attach competitive quotes and supporting documentation of the quote process (forms & emails) to the requisition.
  - ii) The requisition is reviewed by P2P, approved, and a PO is sent to the supplier. If a signature is required on a contract, send the document to [contracts@nebraska.edu](mailto:contracts@nebraska.edu). Once the contract is signed, attach it to the requisition.