

Quote Process

Quotes are informal bids processed according to the “dollar thresholds” and processes established by District Policy.

Typically departments will attach quote information to their requisition. Departments should request assistance from purchasing for large dollar purchases.

Some items for consideration in a quote process include:

- The quote process is important in determining the best purchase option for departments.
- Always request that the vendor provide complete pricing including any education discounts also known as academic pricing.
- Quote requests should be issued to those vendors who have been identified as likely sources and who are qualified to provide the goods or services needed.
- All vendors who are asked to submit a quote will require complete information including a detailed description of the product or services needed, quantities needed, color or finishes stipulations, special requirements such as vendor certifications or licenses, special delivery requirements and any other information that is key for the vendor to provide an effective quote.
- Include a specific deadline (date and time) for all vendors to submit their quotes.
- The purchasing standard for quotes is to allow 2 weeks between the issue time and receipt of quotes.
- Lead-time – is the period of time it takes for the product to ship after the vendor receives a purchase order. If the goods are needed in a short time frame this information is critical.
- Total Cost – this factor is important when determining lowest price. The components of total cost include: price, shipping, maintenance, implementation, upgrades, cost of annual license for software products, warranty, payment terms and all other costs that apply during the life cycle of a product.
- Shipping Costs – District requests that shipments be made “FOB Destination” meaning that the vendor pays the shipping costs upfront and the District takes title at delivery. Shipping costs may be added to the invoice by the vendor, the quote should reflect shipping costs and how they will be handled.
- Taxes – the District pays sales tax for goods.
- Payment Terms - The District’s standard payment term is Net 30. Other payment terms may be arranged if a vendor offers additional discounts for early payment. Consult with your Buying Team for additional information if required. If the vendor requests a deposit or payment upfront, please contact the Buying Team, it is preferable to pay for goods or services upon receipt and within the Net 30 day payment terms adopted by the District.
- Return Policy – If the possibility exists that the items will be returned, find out what is the vendor’s return policy. Some vendors will charge a restocking fee in addition to the shipping costs.
- If purchasing a high dollar item contact purchasing to ensure that all the terms and conditions and information on the purchase are included in the vendor’s written quote, to ensure that there are no

added costs later on. Vendors may request a signature on the terms and conditions document, note that the only authorized signatories for contractual documents at the college are the President, the Senior VP of Finance & Administration and the Director of Purchasing.

- When procuring services, it is helpful to establish a complete scope of work, to avoid incurring additional costs during the course of a vendor providing those services.
- If procuring a service or a large dollar purchase it is recommended that you contact the Buying Team to confirm the requirements for the purchase. Services that are considered public works (construction related) require special insurance and bonding and will be handled in Purchasing.
- Purchasing Cooperatives – “piggy back” contracts awarded by peer governmental organizations. To check if an item is available in a purchasing cooperative contract, contact the manufacturer or dealer and ask them if they are awarded through any cooperatives and send the information to purchasing to confirm the coop is approved for SRJC. For more information contact the Buying Team or go to <https://purchasing.santarosa.edu/purchasing-cooperatives>