SHORT FORM INVITATIONAL
REQUEST FOR QUOTATION (RFQ) (less than $10,000) GUIDELINE

The Short Form Invitational RFQ has been developed to provide Departments with a simple tool to solicit low dollar value quotes (less than $10,000). This provides a consistent template in which the College provides information to potential bidders, and also a consistent manner in which they return their quotes.

The inclusion of the College's terms and conditions in this process helps ensure that our interests are looked after and that we are not simply accepting the Sellers terms and conditions, which are generally skewed in the Sellers favour.

How Do I Use the Short Form Invitational RFQ?

1. Obtain the most current version of the Short Form Invitational RFQ from the Purchasing Website.

2. User required information is in **bold** text. Update these areas on Pages 1 and 2, as well as sections 2 and 3 of Appendix A.

    - **The Request for Quotation (RFQ) #** should be a unique number specific to this particular opportunity. As an example, it could be a combination of the date and the person issuing the document. If you issue multiple RFQ's in a day, add a number between the date and the name to provide a unique identifier. The format would be as follows:

        o   MM/DD/YYYY – First and Last Name
        o   Example – 10/20/2017 – Ken McLean
            or
        o   MM/DD/YYYY 'x' – First and Last Name
        o   Example – 10/20/2017 - 2 – Ken McLean

    - **Appendix A, Section 2, Deliverables** – This is the area where you are providing your requirements/specifications - provide an accurate description of the goods and services (including anticipated quantities, if applicable) using neutrally drafted technical specifications. Disclose all information material to performance of the contract that could affect the respondent's decision to respond or their price, including:

        (a) relevant performance timeframes and location details;
        (b) any uncommon risks or performance conditions; and
        (c) any specific terms and conditions that will govern the performance of the contract

        Be sure to specify if the selected respondent will be required to provide proof of insurance coverage, WCB coverage, security clearances, etc. within x days following written notification of selection etc.

- **Appendix A, Section 3, Non-binding Price Estimates** – Insert a pricing table here for the required Deliverables. This should include instructions to respondents regarding how to structure the pricing (e.g., whether to include shipping, warranties, type of currency, etc.)

3. Send the completed RFQ form to the potential bidder(s).

4. If during the quoting process you receive questions from any of the potential bidders, you must ensure that all potential bidders receive a copy of the response. It is imperative that all bidders have the same information when preparing their bid.

5. Responses are due on or before the date and time indicated in the RFQ. Late responses cannot be considered. Print each response and mark on it the date and time received.

6. Once the Closing Date and Time passes - review each response to ensure it meets the requirements you set out in the RFQ. Responses which do not meet the requirements of the RFQ cannot be considered.

7. All responses which meet the requirements of the RFQ move on to the evaluation stage. If no specific evaluation criteria were listed in the RFQ the default criteria is Price, and the lowest quote is the Successful Bidder. If you want to consider criteria in addition to Price, this must be set out in the RFQ document and every bid must be scored against those criteria. See Purchasing for assistance in setting this up.

8. Once the Successful Bidder has been identified they need to be advised. An email confirming the award and pending purchase order is sufficient. Also advise any other bidder(s) that they were unsuccessful.

9. Enter the Requisition in Evolve and send the back-up documentation to the Purchasing Department. The back-up documentation will include a copy of the RFQ, any clarifications and/or responses to questions and a copy of each response that has been received.

10. The Purchase Order process cannot begin until the back-up documentation is received in the Purchasing Department.

Note:

- If the Successful Bidder is a new supplier a Supplier Data Record will need to be completed and sent to the Purchasing Department so that the supplier can be set-up in Evolve. The Purchase Order process cannot begin until the supplier has been set-up on the system. It is the responsibility of the department who issues the RFQ to obtain the Supplier Data Record.

- Suppliers who will be coming on-site to perform their work must be properly insured <u>before</u> they arrive. It is the responsibility of the department who issues the RFQ to ensure insurance is in place prior to the start of work. Work with Tina Benincasa prior to the vendors arrival.