

SHORT FORM INVITATIONAL RFQ TEMPLATE USER GUIDE

1. PURPOSE

The purpose of this guide is to assist staff in preparing RFQ documents using the College's Short Form Invitational RFQ template.

This document should be read in conjunction with the Decentralized Procurement Procedures Document, which will guide Departments through the steps that must be taken to procure goods and services with a procurement value under \$25,000.

2. STEPS FOR PREPARING THE RFQ DOCUMENT

Follow the steps set out below to prepare the RFQ:

<p>STEP 1: DRAFT THE SCOPE OF WORK</p> <ul style="list-style-type: none"> Clearly describe all deliverables and requirements.
<p>STEP 2: DEVELOP THE PRICING TABLE</p> <ul style="list-style-type: none"> Complete the Pricing Table in the Quotation Form or replace with alternate version. Do not make changes to any standard wording in the Quotation Form.
<p>STEP 3: COMPLETE THE COVER PAGE</p> <ul style="list-style-type: none"> Complete all information required in the highlighted sections. Do not make changes to any language that is not highlighted.
<p>STEP 4: CONDUCT FINAL REVIEW</p> <ul style="list-style-type: none"> Review the completed document to ensure everything is complete and clear Remove any remaining highlighting and drafting instructions

STEP 1: DRAFT THE SCOPE OF WORK

- Purpose of the Scope of Work.** The SOW describes the goods and/or services to be provided by the successful supplier. A poorly drafted SOW is likely to result in inaccurate quotes and/or not getting the goods and/or services you expect to receive. The SOW must **not** include bidding instructions, RFQ process rules, submission requirements or evaluation criteria.

2. Requirements and Specifications. All of the goods and/or services to be provided by the supplier are referred to as the “Deliverables”. When describing the Deliverables, ensure that the following questions are answered, if applicable:

- What? - What goods and/or services do you require?
- When? - When are the goods/services to be delivered/provided? (delivery date, completion deadlines)
- Where? - Where are the goods to be delivered? (delivery location address) - Where are the services to be provided? (onsite, remotely, both)
- Who? - Are you requesting services that must be provided by specific individuals? (certified architect, licensed engineer, licensed tradesperson)
- How? - How are the services to be provided? (methodology, service levels, detailed requirements)

Content should be organized by topic and ordered in a way that is meaningful to the reader. For example, if you were drafting an SOW for the purchase of a piece of equipment, it might include the following elements in the following order:

1. Description of Equipment
2. Technical Specifications & Performance Requirements and/or Make & Model
3. Delivery
4. Installation
5. Acceptance Testing
6. Training
7. Maintenance & Support
8. Warranty

Ontarians with Disabilities Act (AODA). The Government of Ontario, Legislative Assembly and designated public sector organizations shall incorporate accessibility criteria and features when procuring or acquiring goods, services or facilities, except where it is not practicable to do so. Departments must take into consideration the Accessibility for Ontarians with Disabilities Act and should refer to the AODA Information on the College’s [Purchasing Website](#) or contact the College’s Accessibility Facilitator.

Sustainability. Departments are expected to consider the environmental impacts of the procurement and follow the College’s [Sustainable Procurement Guidelines](#).

3. Disclosure of Additional Information. Make sure that you disclose all information that is relevant to the deliverables and could affect the supplier’s risks or costs. Failing to disclose such information could lead to unexpected costs and potential legal challenges if the risks cause damage or injury to

the supplier. For example, in the case of a construction SOW, if there was an environmental assessment that disclosed contaminants on the construction site, the assessment should be disclosed and attached to the SOW.

- 4. Sample Outline of SOW.** The following is a sample outline of a Scope of Work that is provided as an example. You may wish to follow the general structure and use any of the headings that are applicable. Use the sections that are relevant and remove or revise those that don't fit your requirements. You need to customize these sections to clearly describe your actual requirements.

SCOPE OF WORK	
A. INTRODUCTION AND OVERVIEW	
Provide a clear high-level description of requirements, including a general overview of the components of the Deliverables, and indicate if part of larger project.	
B. ADDITIONAL INFORMATION	
Reference any relevant reports, background studies, etc. and attach them to the SOW. If there is no additional information to provide, you should remove this section.	
C. GOODS	
Specifications	<p>The Supplier must provide the following goods, in accordance with the following specifications and requirements:</p> <p>[describe the required goods]</p> <p>Describe the type and quantity of goods, including the required make & model and/or the expected performance and functional requirements. If applicable, include requirements for compliance with recognized standards or certifications.</p>
Warranty	Specify warranty requirements.
Delivery Timelines	<p>Include required deadlines or timelines for delivery. For example:</p> <p>The required goods must be received by the College no later than [date].</p> <p><u>OR</u></p> <p>The required goods must be received by the College within [time period] from the time the College issues the purchase order.</p>

Delivery Location	Specify the exact location and address for delivery.						
Special Requirements and Constraints	Explain any unique requirements or constraints that may affect the supply and delivery of the goods, including hours of delivery acceptance, advanced notice requirements (if any), and special requirements for delivery (e.g., Is there a loading dock? Is delivery curbside to a jobsite?). If none, you should remove this section.						
D. SERVICES							
Scope of Services	<p>The Supplier must provide services and personnel, and otherwise do all things necessary, to perform the following scope of services:</p> <p>[describe the required services]</p> <p>Include clear terms of reference for the assignment, such as objectives, staff responsibilities, reporting requirements, acceptance requirements and service levels.</p>						
Delivery Timelines	<p>Include commencement and completion dates. For example:</p> <p>The services must begin no later than [date] and must be completed by no later than [date].</p> <p>If there are multiple milestones with specific deliverables to be provided, you should include a more detailed breakdown of timelines for each milestone/deliverable:</p> <table border="1" data-bbox="516 1289 1312 1457"> <thead> <tr> <th data-bbox="516 1289 932 1360">Milestone</th> <th data-bbox="932 1289 1312 1360">Deadline for Completion</th> </tr> </thead> <tbody> <tr> <td data-bbox="516 1360 932 1411">[deliverable]</td> <td data-bbox="932 1360 1312 1411">[date]</td> </tr> <tr> <td data-bbox="516 1411 932 1457"></td> <td data-bbox="932 1411 1312 1457"></td> </tr> </tbody> </table>	Milestone	Deadline for Completion	[deliverable]	[date]		
Milestone	Deadline for Completion						
[deliverable]	[date]						
Service Location	<p>Indicate where services are to be performed. For example:</p> <p>Onsite: The Supplier must perform the services onsite at [site location].</p> <p>Remote: The Supplier is expected to perform the services remotely.</p> <p>Both: The Supplier is expected to perform the services remotely, with the exception of the following that will take place onsite at [site location]: [describe any requirements for supplier to attend onsite, such as in-person meetings or in-person presentations, etc.]</p>						

<p>Special Requirements and Constraints</p>	<p>Explain any unique requirements or constraints that may affect the delivery of the services. If none, you should remove this section. For example, if the work has to be performed during specific hours: All onsite performance of services must be performed Monday to Friday, [working hours]. If none, you should remove this section.</p>
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STEP 2: DEVELOP PRICING TABLE

- 1. Purpose of the Pricing Table.** The Pricing Table becomes the contract pricing that will be included in or attached to the Purchase Order. The Pricing Table must relate to all the goods/services requested in the SOW.
- 2. Sample Table Provided.** A sample Pricing Table is included in the Short Form Invitational RFQ template. You should review this table and consider whether it is appropriate for your procurement. You can replace this table with an alternate version, if necessary, to suit your needs.
- 3. Pricing Structure.** Start by listing all the goods/services specified in the SOW and determine how you want them to be priced. Some examples:

Good/Service	How Priced?
Goods	Priced per unit
Services	Lump sum per deliverable/milestone
Equipment/Vehicles	One-time all-inclusive purchase price
Equipment Maintenance and Support	Annual fee
Construction	Lump sum, perhaps broken down by area or element of work
Software	A: Annual or monthly subscription fee over fixed contract term, including all future optional renewals/extensions. B: One-time perpetual license fee

- 4. Obtaining a Total Quotation Price.** The Pricing Table should be designed to result in a single Total Quotation Price to allow for an apples-to-apples comparison of each supplier’s price. The Total Quotation Price determines the ranking of suppliers.

5. Estimated Quantities. If the exact quantities that will be needed are not known, you will need to obtain pricing based on estimated quantities. Do not artificially inflate quantities in the hope of getting lower prices as this creates a risk of unfairness or misleading of suppliers and may create future issues for the College.

SAMPLE PRICING TABLES

FOR GOODS – FIXED QUANTITY

Item	Quantity	Unit Price	Total Price
TOTAL QUOTATION PRICE			

FOR GOODS – ESTIMATED QUANTITY (actual volume may vary)

Item	Estimated Quantity	Unit Price	Total Price
TOTAL QUOTATION PRICE			

FOR SERVICES

SERVICES	Total Price
Milestone/Deliverable	\$
Milestone/Deliverable	\$
Milestone/Deliverable	\$
TOTAL QUOTATION PRICE	\$

FOR EQUIPMENT WITH MAINTENANCE AND SUPPORT SERVICES

Equipment	Quantity	Unit Price	Total Price
Services	Number of Years	Annual Fee	
TOTAL QUOTATION PRICE			

STEP 3 – COMPLETE THE COVER PAGE

1. **Complete Highlighted Areas.** Complete the information in the highlighted areas of the Cover Page. Do not make changes to any language that is not highlighted.
2. **College Contact.** Departments must provide a single point of contact who will manage the process and monitor their email for correspondence from suppliers. All communications with suppliers must be received at and sent from the email address provided.
3. **Purpose of Site Visit.** The purpose of the site visit is to give the suppliers an opportunity to view the work site and familiarize themselves with existing conditions. Site visits are not necessary in the majority of procurements and should only be held where requirements cannot be described in the drawings and specifications, and it is necessary for suppliers to view the site to understand the scope of work and prepare their quotations. If a site visit will be held, you must specify the exact time and location.
4. **Dates and Deadlines.** On the cover page you will need to specify the Issue Date, the date of any Site Visit (if applicable), the deadline for Supplier Questions and the deadline for Quotation Submission. Make sure that all the dates fall on business days. Whenever possible, avoid scheduling dates and deadlines immediately before and after statutory holidays.

Posting Time. Suppliers must be given a reasonable period of time to prepare and submit a quotation. Depending on the complexity of the procurement, the posting time should be in range of 7-10 days if there is no site visit or 10-15 days if a site visit is required.

Timing of Site Visit. If a site visit is necessary, the posting time will need to be longer than normal to provide suppliers with sufficient notice of the site visit and allow sufficient time after the site visit to ask follow-up questions. The date of the site visit should be at least 5 business days from issuance of the RFQ, whenever possible, and **must** not be less than 3 business days from issuance of the RFQ. A minimum of 2 business days must be provided between the site visit and the deadline for supplier questions.

Deadline for Supplier Questions. When setting the deadline for supplier questions, you need to provide suppliers with sufficient time to review the RFQ and submit their questions and give yourself sufficient time to review the questions you receive and issue responses to the questions well in advance of the deadline for quotation submission. Questions from suppliers must be responded to at least 2 business days before the Quotation Submission Deadline.

The following are suggested timelines for process with and without a site visit. Where range is shown the longer time frame is recommended whenever possible.

Timelines - Without Site Visit:

Event	Timeline
Issue Date	Date RFQ is sent to suppliers
Site Visit	N/A
Supplier Questions Deadline	3 - 5 business days from Issue Date
Quotation Submission Deadline	4 - 5 business days from Supplier Questions Deadline

Timelines – With Site Visit:

Event	Timeline
Issue Date	Date RFQ is sent to suppliers
Site Visit	3 - 5 business days from Issue Date
Supplier Questions Deadline	2 - 3 business days from Site Visit
Quotation Submission Deadline	4 - 5 business days from Supplier Questions Deadline

STEP 4: CONDUCT FINAL REVIEW

- 1. Remove all annotations and highlighting.** Make sure all instructions in square brackets - e.g. **[See Template User Guide for guidance on preparing the SOW]** - have been removed. Check that all **yellow highlighted** areas have been completed and remove any highlighting. There should be no colour highlights remaining in the final assembled document.
- 2. Perform a quality review.**
 - Review the document for completeness and typographical errors.
 - Review the document from the perspective of a supplier – is it clear?
 - Ask a colleague to review the document for feedback, if possible.
- 3. Double-check key information dates.** Double-check all information on the Cover Page and make sure all dates and deadlines have been updated. If there is any delay in issuing the RFQ, be sure to return to the document and update the dates and deadlines on the Cover Page before issuing.