# **Using the ‘Invitation To Quote Cover Sheet’ to Give Preference to Ontario Businesses in Invitational Competitive Procurements.**

This document is a supporting resource to the FACTS ‘Invitation To Quote Cover Sheet, Giving Preference to Ontario Businesses in Invitational Competitive Procurements’ video for staff and faculty who use a screen reader or otherwise require a non-video format. It is not an exact transcript of all text seen on-screen in the video, however it does contain all of the same information.

If you need more help with the ‘Invitation To Quote Cover Sheet’, please contact Procurement Services by email (procurementservices@carleton.ca) or phone (613-520-3622).

In this document we'll review the invitational competitive procurement process, how to complete the Invitation To Quote Cover Sheet, and what to do if you need help.

This is the second video in the BOBIA series.

## **Invitational Competitive Procurement Process**

The Invitation to Quote Cover Sheet is used to reach out to Vendors for quotes. In this document, I'm going to focus on examples that fall within the Invitational Competitive thresholds. These are purchases with Total Procurement Values that fall between $25,000.01 to $121,199.99.

Complete sections 3 to 5 of the Invitation To Quote Cover Sheet.

Email the Invitation To Quote Cover Sheet, with sections 3 to 5 completed, to the Vendors that you are inviting to provide a quote.

Interested Vendors must complete sections 6 and 7 of the Invitation To Quote Cover Sheet, provide an actual quote, and include any additional documentation.

Interested vendors will return completed Invitation To Quote Cover Sheets by the Respond By Date.

Then the next step is to evaluate the vendors’ responses and reach a decision.

**Completing the Invitation To Quote Cover Sheet**

The [Invitation to Quote Cover Sheet](https://www.youtube.com/redirect?event=video_description&redir_token=QUFFLUhqazdjSkduYzRFWU5vUlkyVFpuLUFzVkd0RTNXQXxBQ3Jtc0tuUTBtUUt0eUZtZnFwQjJESTFEUTF3UktDSHhfekhvdjZlRE45S1V5WjNhdjdsTDlSN3BfQ01GUGxoQ0U3YWlMYi1qSEFvRlczUnBQbWlTdFZtMTB5R2VjV2MyVGtYNDdWYVdiRzV2eUVTaG5iSzFxcw&q=https%3A%2F%2Fcarleton.ca%2Fprocurement%2Fbuilding-ontario-businesses-initiative-act-bobia%2Finvitation-to-quote-evaluations%2F&v=1c19o2qZbBc) is a template you can use to collect both the required number of quotes and your Vendors’ representation regarding their status as an Ontario Business at the same time. Every field on this form is mandatory.

Section 1 provides you and the Vendors with a summary of the process we are covering in this video.

Section 2 covers the general conditions that Vendors should be aware of when they submit a quote. It also provides them with a link to Carleton’s Standard Terms and Conditions which are included in eShop Purchase Orders.

Section 3 is for your contact information.

Section 4 provides the Vendors with more information regarding what you are buying. Let’s look at each field separately.

Let’s begin with the Timetable. The ITQ Issued On date is the day that you will send the ITQ Cover Sheet to all of the Vendors being invited to quote. All Vendors should receive the ITQ Cover Sheet at the same time. The Respond By date is the deadline for all invited Vendors to send you their quote by. You should only consider quotes that were received by the deadline.

Next, is the Purchase Summary. The Completion or Delivery Date is important context that tells the Vendors what timeline they would be working within if they are the Successful Respondent.

When describing the goods or services you’re planning to procure, make sure to describe all the mandatory requirements so that they have a full understanding of your needs. In Section 5 of the ITQ Cover Sheet you will select the evaluation method that will be used to decide which Vendor you will purchase from. If you decide to do a Rated Criteria evaluation, you will also need to describe what information the Vendors will need to provide you in addition to a cost-based quote.

Let’s try an example! In this example, we are procuring bus transportation services for fifty students. There are mandatory requirements like the schedule and the amenities that the service must provide. We are opting for a Rated Criteria evaluation, so we must list the series of criteria that the Vendors will be evaluated based on and any information the Vendors should submit.

Section 5 tells the Vendors how each criterion is weighted. Remember that Ontario Businesses always receive a 10% preferential margin. Begin by selecting a method of evaluation. If you are selecting Price Only, you will not need to describe any Rated Criteria as part of your Description of Goods or Services in Section 4.

A Rated Criteria is another way of saying, what factors do you want to consider when evaluating the options available, and how important is each factor? Think of buying a car for your personal use. Maybe you require two doors and four-wheel drive, but you would be more likely to purchase a car with better gas mileage. In this case, gas mileage is the Rated Criteria. The templates provided have options for Rated Criteria that you can use, however you are the expert in what criteria are important in making this purchase decision.

Let’s continue our transportation example! Rated Criteria has been selected and criteria added to section 5.2. Use the drop-down arrows to choose one of the criteria options provided or type your own criteria in the field. Rows for the Price and Ontario Business Preferential Margin criteria have been added to the table for you.

Don’t forget to indicate whether this is a Canadian Foundation for Innovation, or CFI, funded project.

Send the form, with completed sections 3 to 5, to the vendors you will invite to submit a quote. Vendors will complete sections 6 and 7 and return the ITQ Cover Sheet to you with their quote and any requested documents from Section 4.

Once the Response By date has passed, you can use this [Invitation to Quote Evaluation Template](https://www.youtube.com/redirect?event=video_description&redir_token=QUFFLUhqbDJEakZVSUUxZENVeVRSc3RjQ0dERFZOVmtkUXxBQ3Jtc0trM0ltOE8tNUwySE41dHFma2hnNEV2RU1EbWFrR295blo3TktfZXJ0LThLT2xtM2tyZGJpNzdHeHROblJiaUhIYURkc2hMcEFreEoyVnRnR2xyRFRJN2YybGN3V2N5STc0OHdqeW1RdGJLM2pXblRPSQ&q=https%3A%2F%2Fcarleton.ca%2Fprocurement%2Fbuilding-ontario-businesses-initiative-act-bobia%2Finvitation-to-quote-evaluations%2F&v=1c19o2qZbBc) to evaluate the quotes received. [Watch the next video in the series to learn more](https://carleton.ca/facts/financial-administration-policies/procurement-policy/).

Finally, complete and submit an eShop Purchase Requisition form for the successful Vendor, attaching relevant quotes and supporting documentation.

## **What to do if you need help.**

This video has provided an example of how to procure goods and services where your Total Procurement Value is $25,000.01 to $121,199.99.

Procurement Services can help. Contact them early in the process by phone (613-520-3622) or email (procurementservices@carleton.ca) to help ensure you are on the right path.