

A presentation by
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Strategic Procurement Services

The Sourcing Process – Obtaining Quotes & RFX's

How to obtain a Quote



For purchases < \$99,999 in value, you may contact vendors directly for quotations.

When soliciting quotations:

- Contact vendors and request the same specifications, part numbers, schedules and delivery expectations,
- Request quotations be submitted on company letterhead,
- Ensure 3 quotations are submitted for all purchases **> \$10K**

What do we mean by RFx?



RFx – one of the most common acronyms in the strategic sourcing and procurement landscape, is a catch-all term that references:

Request for Quotation – RFQ

All valid proposals received will be reviewed and scored by the evaluation team based on the Evaluation Criteria set out in the RFx document.

Request for Proposal – RFP

An RFP is used for services or complex products where quality, service or the engineered final product will be different from each vendor responding.

Request for Supplier Qualifications – RFSQ

An RFSQ is issued when we want to set up a number of suppliers on a “preferred supplier list”. This process must be facilitated by Procurement.

Why do we use an RFX?



An RFX meets Broader Public Sector (BPS) Procurement Directive Principles (as required by the Ontario Ministry of Finance):

- provides consistent procurement practices for all BPS organizations,
- ensures publicly funded goods and services are acquired by BPS organizations through a process that is open, fair, and transparent,
- ensures accountability through each stage of the procurement process,
- maximizes the value that BPS organizations receive from the use of public funds.

When do we use an RFx?



Goods, Non-Consulting Services and Construction

Note: Research CFI Value INCLUDES In-Kind

Total Procurement Value	Means of Procurement
Under \$5,000	P-Card or PO with single quote
\$5,000 to \$9,999.99	PO with single quote
\$10,000 to \$99,999.99	PO resulting from invitational competition (3 quotes minimum) or open competitive process
\$100,000 or more	Open competitive process (RFx)

Consulting Services Providers (CSP)

Total Procurement Value	Means of Procurement
\$0 to \$99,999.99	Invitational (3 quotes minimum) or open competitive process
\$100,000 or more	Open competitive process (RFx)

When do we use an RFX?



An RFX process is mandatory for any good or service with a value **> \$100K**.

An RFX process is recommended for any good or service with a value **between \$10K and \$99,999** where price is not the only determining factor.

Who should prepare/issue an RFx?



Procurement involvement is **mandatory** for:

- any good or service **> \$100K** or,
- an open, public tender of **any value**.

Procurement involvement is **not mandatory** for:

- any good or service **between \$10K and \$99,999** (a minimum of 3 quotes is acceptable),
- Procurement involvement is recommended for any goods or services where an open tender or complex selection criteria is required.

What information is required for an RFx?



To assist in the preparation of an RFx the following information should be available:

- a detailed description of the good or service,
- a required timeline for the start and end of services or required receipt of goods,
- evaluation criteria to be used for the selection of the good or service – Procurement may assist as required,
- identifying members of the evaluation team who will review and score the proposals received.

What is the timeline for an RFx?



Timeline requirements:

- An RFx with a value **> \$100K** or that is an open, publicly tendered RFx must be posted for a **minimum of 15 calendar days** from the initial posting date.
- The timeline must include an appropriate Question and Addendum period.
- The timeline must allow proponents a reasonable time to prepare a quality response.
- After an RFx has closed, all proposals received are reviewed and scored by the evaluation team.
- The final stage of evaluation may include demonstrations or interviews.

How do you evaluate an RFx?



Evaluating an RFx:

- All valid proposals received will be reviewed and scored by the evaluation team based on the Evaluation Criteria set out in the RFx document.
- Evaluation team scoring is normally monitored and assisted by Procurement.
- Pricing is scored as the final step in the evaluation process.
- The proponent(s) with the highest total score(s) as defined in the RFx document will be declared the highest scoring proponent and enter the contract negotiation phase to finalize details and award with assistance from Procurement.

How may we help you today?



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