

# Vendor Quote Solicitation Cover Sheet

This Quote Solicitation request invites Vendors to submit a non-binding offer (“Quote”) for the provision of goods or services valued under \$121,200 (excluding applicable taxes). As per the University’s Procurement Procedures, a minimum of one (1) quote is required for purchases valued up to \$25,000. For purchases between \$25,000 and \$121,200 a minimum of three (3) quotes are required. This Invitation does not create, nor give rise to the applicable legal rights or duties of a formal, legally binding procurement process.

As a reminder, if you select a [University Vendor of Record](#), **you may not need to complete this form.**

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## Instructions

**Please follow the steps below.** Need help? Email [purchase@yorku.ca](mailto:purchase@yorku.ca).

1. Determine whether your purchase requires a minimum of one (1) or three (3) quotes based on its pre-tax value.
2. Choose whether you will run a price-only or rated criteria evaluation.
3. Check the database for Ontario businesses to see if the vendor(s) has/have already completed an Ontario Business Attestation.
4. Provide the Ontario Business Attestation form to any vendor not listed on the database. **Vendors must submit the Attestation along with their Vendor Quote Solicitation.**
5. Run your competition.
6. Complete your Evaluation based on the evaluation method you chose and select a vendor.
7. If a non-Ontario business is the successful bidder, **you are required to complete the NOBJ form. Do not send that form to the Vendor.**
8. **If your purchase is under \$25,000 (excluding HST)** provide written confirmation to the selected vendor to proceed with the purchase. Upload the Vendor Quote Solicitation form, Ontario Business Attestation, and/or the NOBJ (when necessary) to SmartBuy with your coded invoice for payment processing.

**If your purchase is over \$25,000 (excluding HST)** Complete and submit a [Purchase Requisition Form](#) in SmartBuy. You must also include the Vendor Attestation and/or NOBJ and Vendor Quote Solicitation form.

## Section 1 – Determine Evaluation Method

Select one of the following methods of evaluation:

Price Only.

Rated Criteria.

### 1.1. PRICE ONLY EVALUATION

Quotes will be evaluated based on the following criteria:

Criteria	Weight (%)
Price	90%
<b>Ontario Business Preferential Margin</b>	<b>10%</b>
Total	100%

### 1.2. RATED CRITERIA EVALUATION

Quotes will be evaluated based on the following criteria. More information on Rated Criteria and Evaluating can be found on [Strategic Procurement Services' website](#).

**If Rated Criteria are identified, you must include details regarding what the Vendor should submit on the Vendor Quote Solicitation form below.**

Sample Weighted Criteria	Weight (%)
<i>Technical requirements with specifications</i>	40%
<i>Social procurement</i>	5%
<i>Sustainability</i>	5%
<i>Vendor/Team Experience and Qualifications</i>	10%
<i>Health and Safety</i>	5%
<i>Delivery Schedule</i>	5%
<i>Price</i>	20%
<b>Ontario Business Preferential Margin</b> (note, this value must always be at a minimum 10%)	<b>10%</b>
Total	100%

# INVITATION TO QUOTE EVALUATION TEMPLATE

The [Invitation to Quote Evaluation Template \(EXCEL\)](#) is available on the Strategic Procurement website.

## Sample Invitation to Quote Evaluation Template

### Invitation to Quote Evaluation Template

Questions? Email [purchase@yorku.ca](mailto:purchase@yorku.ca)

#### Instructions:

Complete all **blue filled cells**.

(i) Evaluation Information: Use the information from Section 5 of your Invitation to Quote to complete these cells.

**HINT:** the Total Weight (Row #9) must be 100%.

(ii) Vendor Information: Use the information from each Vendor's response in Sections 6 and 7 of your Invitation to Quote to complete these cells.

(iii) ITQ Response Score: Complete your evaluation of each Vendor's quote, for each Evaluation Criteria.

**HINT:** Rows #3 and #7 will automatically calculate based on the entries in Rows #2 and #6, respectively.

**HINT:** select a cell to see more information.

Row #	(i) Evaluation Information	(ii) Vendor Information		
1	Vendor Name	York Lions Co	123 Glendon Inc	Campus Corp
2	Did the Vendor represent that they are an <b>Ontario Business</b> ?	Yes	Yes	No
Evaluation Criteria		(iii) ITQ Response Score		
	Weight (/100%)			
3	Ontario Business Preference (%)	10%	10.0%	0.0%
4	Price Score (%)	30%	30.0%	28.6%
5	Price (\$)	\$1,500.00	\$1,600.00	\$1,575.00
Rated Criteria (if applicable)		Rated Criteria Score (/10)		
6	<i>Experience &amp; Qualifications</i>	10%	8.00	9.00
	<i>Schedule or Delivery Timelines</i>	10%	9.00	10.00
	<i>Support and Maintenance</i>	10%	10.00	7.00
	<i>Warranty</i>	10%	7.00	10.00
	<i>Social Procurement</i>	10%	8.00	8.00
	<i>Sustainability</i>	10%	7.00	8.00
7	<b>Rated Criteria Sub Total (%)</b>	60%	49.0%	52.0%
8	<b>Vendor's Evaluation Score (%)</b>		89.0%	90.1%
9	<b>Total Weight (100%)</b>			79.6%
				<b>100%</b>

# NON-ONTARIO BUSINESS JUSTIFICATION FORM (NOBJ)

BOBIA requires that purchases below \$121,200 be made from Ontario businesses. This form records the justification for not awarding to an Ontario business for the following purchase:

Procurement Details			
Good or Service:			
Vendor:			
Amount:		Date:	

Reason for Exemption
<p>No Ontario business available/does not exist</p> <p>An Ontario business exists, but does not meet business need for the reason detailed below:</p> <p>Ontario businesses were given 10% preference in evaluation per the attached criteria, but a non-Ontario business was selected</p> <p>Purchase was made in emergency circumstances (defined as a situation or impending situation that could result in serious harm to persons or substantial damage to property)</p> <p>Goods or services are in an exempt category:</p> <ul style="list-style-type: none"><li>External legal services</li><li>Treasury services (related to the management of financial assets and liabilities, including services related to borrowing, debt management, risk management, cash management, banking, or investing)</li><li>Goods or services procured for commercial sale or resale or for use in the production of a good or service intended for commercial sale or resale</li></ul>

Authorization & Signature	
Name & Title:	
Department:	
Signature:	
Date:	

# ONTARIO BUSINESS ATTESTATION FORM

*To be completed by an authorized agent of the Vendor:*

The authorized agent represents and warrants that pursuant to [O. Reg 422/23](#), it is an Ontario Business (a supplier, manufacturer or distributor of any business structure that conducts its activities on a permanent basis in Ontario, and either has its headquarters or main office in Ontario or has at least 250 full-time employees in Ontario at the time of the applicable procurement process).

Yes

No

The authorized agent acknowledges the Vendor understands the instructions and conditions of this request and hereby offers to supply goods or services as per this Quote; and for greater certainty the agent has the authority to submit this Quote on behalf of the Vendor.

Authorized Agent's Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# VENDOR QUOTE SOLICITATION

THIS IS NOT AN ORDER

To be completed by York University purchaser.	Select the applicable, mandatory response:  The Vendor has already completed the Ontario Business Declaration and appears on York’s database  I have attached the Ontario Business Declaration Form  I have attached the Non Ontario Business Justification form
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## INVITATION TO VENDOR

Company		<b>GOOD OR SERVICE REQUIREMENT</b>
Address		(GENERAL DESCRIPTION ONLY, DETAILS BELOW)
Contact		
Telephone No.		
Fax No.		
Email Address		

Issue Date		Quotes Accepted By: (Yes/No)	Submit To:
Closing Date		Fax Email Sealed Envelope	
Closing Time			
Contact			
Title			
Telephone No.			
Ext. No.			
Email Address			

## GENERAL INSTRUCTIONS & CONDITIONS

1. This Quote must be signed by an authorized agent of the Vendor or it will be rejected.
2. The authorized agent of the Vendor must complete the Ontario Business Declaration if requested by York University. Please note that payments will be withheld until York University receives all requested information.
3. Late Quotes will be rejected; no exceptions.
4. Prices will be considered to be in Canadian funds, unless otherwise specified by the University.
5. If you do not wish to submit a Quote, please indicate in the No Quotation section the reason for your decision and return to the Contact.
6. Where a “brand name” is indicated in the Description no substitutions shall be considered unless the term “or equivalent” appears beside the “brand name”.
7. York University reserves the right to award a contract “in whole or in part”. Acceptance of a Quote shall be by written confirmation or Purchase Order. Any purchase resulting from this Quote Solicitation is subject to York's [Standard Terms & Conditions](#).

**VENDOR QUOTE SOLICITATION – THIS IS NOT AN ORDER**

**GENERAL INSTRUCTIONS & CONDITIONS (continued)**

8. The University is required to comply with [The Accessibility for Ontarians with Disability Act \(AODA\)](#) (O.Reg. 429/07). The University recognizes the importance of ensuring accessible goods and services are readily available to our community. By submitting a Quote, Vendors certify they have met the rules and requirements for accessibility under the AODA, as outlined for the nature and size of its organization. For more information see Procurement Services’ Accessible Procurement site.
9. The University is required to comply with [The Building Ontario Businesses Initiative Act \(BOBIA\)](#) (O.Reg. 422/23). BOBIA’s purpose is to give Ontario Businesses preference when conducting procurement processes. Vendors must represent whether they meet the definition of an Ontario Business as part of the Invitation to Quote.
10. All equipment must meet applicable standards.

**REQUIRED ITEMS**

(Yes/No)

Details (as required)

1.	Pre-Quote Meeting		
2.	Bid Form		
3.	Samples		
4.	Literature		
5.	WSIB Upon Award		
6.	Certificate of Insurance Upon Award		

**NO QUOTATION**

(Yes/No)

(Yes/No)

Company does not provide the good or service		Not permitted to sell direct to end-user	
Not able to meet the delivery/completion date		Not able to quote competitively	
Not able to meet the quantity requirements		Licensing restrictions	
Other (please specify)			

**FUTURE REQUESTS FOR QUOTATION**

(Yes/No)

We wish to be invited to participate in future quote solicitations for this good or service category	
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