

## Standard RFQ Template

### **Instructions for McGill Requesters who wish to solicit quotations from potential vendors of Goods and Services to the University**

Procurement Services has developed a standard RFQ template with the objective to facilitate the department's task of obtaining quotations from various vendors. By using the standard RFQ template, the University's requirements as well as the terms and conditions of purchase are communicated with the vendor community in a standardized and transparent manner in advance of the University's commitment to purchase. It also allows our potential vendors to prepare their quotations with a clear understanding of McGill's expectations and conditions, removing any ambiguity in the process.

Please follow the following instructions prior to sending a copy of the RFQ to your vendors of interest:

1. The standard RFQ template is available in two formats:
  - PDF - you need to print and manually write your information on the form);
  - Electronic version (Excel) – You can save a copy to your desktop and electronically enter your information on the form.

**Tip:** *by using the electronic RFQ, you may distribute the RFQ electronically (via e-mail) to a vendor (once the Requester's Information section is completed). This allows the recipient vendor to electronically complete the RFQ and send the completed RFQ and the quotation back to you by e-mail.*

2. Complete the top portion of RFQ in the following sequence:
  - **Requester Information:** Department name, contact name, telephone/fax # & e-mail;
  - **Date of RFQ:** defaulted to the day the document is opened;
  - **RFQ closing date:** is the deadline for accepting quotations from potential vendors. The Requester must determine a reasonable RFQ

closing date depending on the nature of the required goods and services as well as the planned acquisition timeline;

***Tip:** to be fair to all vendors, you should not accept quotes that may be forwarded to you after the RFQ closing date.*

- **RFQ NO.:** is a unique reference number to each purchase project, which the Requester may assign to the RFQ for tracking purposes;
  - **Delivery Address (McGill Destination):** Enter the address including the room number where the goods & services are expected to be delivered to;
  - **Item No., Quantity, Unit of Measurement, Catalogue # and Description of the required Goods and Services:** provide detailed description of the goods & services including specifications. If the specifications to the RFQ should require additional space, please use the Request for Quotation – Page 2 as well. Both documents must be fully completed in order for the quotation to be valid;
3. Determine the list of vendors who you wish to solicit a quotation from;
  4. Transmit the RFQ (and Page 2 if required) to each vendor on your list of vendors.