

REQUEST FOR QUOTES INSTRUCTIONS

This document provides a step-by-step explanation of the Request for Quotes Solicitation Template. Please note that those portions of documents highlighted in **Green** will need to be filled in, while those in **Blue** may need to be altered depending on the type of solicitation being issued.

COVER PAGE

- Solicitation Number:** Each Board may develop and use their own numbering system. A new solicitation number is not required for each amendment to a solicitation.
- Date Printed:** This date should not precede the Issue Date.
- Date Issued:** The date the solicitation or amendment was released. The date used for an amendment may differ from that of the original solicitation.
- Procurement Officer:** Name of the individual preparing the solicitation documents. The name used on the Amendment should be the same as that used in the original solicitation. A phone number and e-mail address should be provided for those potential offerors that may have questions.
- Description:** Simply a brief one or two sentence describing the work/goods to be provided.
- E-Mail Address:** Include this if you wish to accept quotes via e-mail. The file types listed are common and should be readily recognized by any of the computers at the Boards. If a PDF file cannot be accessed, the necessary software can be downloaded for free at www.adobe.com. The software is called Adobe Acrobat Reader.
- Length Offer Is Held:** By submitting a quote, the offeror is agreeing to hold their price for a given length of time. By default, this is set for 30 days. This value may be increased should you feel the need to do so. It should not be decreased below 30 days.
- Contact Information:** This page provides the offeror with space to list all of their contact information including their office address and the location any notices (amendment and award documents), payment, or order information should be sent.
- Acknowledgement of Amendments:** If any amendments are issued, the offeror must note the amendment number and date of issue of each amendment issued on Page Two of the original solicitation. This information does not have to be included on the second page of the amendments themselves. This is to ensure that they are aware of any changes that may have been made in the scope of work so it can be guaranteed that each offeror is basing their price on the same criteria.

Discount For Prompt Payment:

Any offeror may provide incentives for early payment which they may note on the second page. These incentives must not be used to evaluate the quotes received; only the values on the Quote Schedule designated for that purpose.

South Carolina Resident Vendor Preference:

“the cost of an item from a resident vendor or an end-product made, manufactured, or grown in South Carolina is unreasonable if the bid exceeds by more than seven percent the lowest qualified bid on the same item or end-product which is made, manufactured, or grown in other states of the United States, or in a foreign country or territory.”

Preferences

Each is only used if one of the offerors claims one or more of the preferences. In the event that occurs, each applicable percentage is added to the quotes and/or individual items submitted by the bidders who **did not** claim the preference(s) as follows:

- S.C Vendor 7% added to entire quote of vendors not claiming this preference.
- S.C. End-Product 7% added to any items not claiming this preference.
- S.C. Vendor and End-Product 10% added to entire quote vendors not claiming this preference.
- U.S. End-Product 2% added to any items not claiming this preference.
- S.C. Vendor and U.S. End Product 9% added to entire quote of vendors not claiming both preferences.

The value used to evaluate the quotes received will be the quoted price plus any applicable percentage(s).

QUOTE SCHEDULE

Items The item chart can be copied and pasted to account for each different item/service requested from the vendors. Should you wish to categorize several items, they may be grouped into lots. Example:

- | | |
|--------|--------|
| Lot A | Lot B |
| Item 1 | Item 4 |
| Item 2 | Item 5 |
| Item 3 | Item 6 |

- Commodity: The type of item or service requested.
- Quantity: The amount requested.
- Unit of Measure: Months, Each, etc.
- Unit Price: This will be filled in by the offeror.
- Extended Price: The unit price multiplied by the quantity. Will also be filled in by the offeror.

Description: Brief description of the item/service. This may help distinguish two like items listed in different item charts.

Should you wish for a breakdown of the price listed in any given item chart, you may include lines below it requesting inclusive costs such as materials and labor, or even the length of a manufacturer's warranty.

When more than one item is requested, a line should be included for the offeror to submit a total quote for all items requested. If lots are used, a line should be included to provide the total of each lot, followed by another line to provide a total value of all lots listed. There should always be one final line from which the Procurement Officer may evaluate the total price of a quote and it should be noted as such. An exception to this rule may occur when using lots to award to multiple vendors.

Use of lots: Lots are commonly used to increase competition by permitting several different offerors to be awarded portions of your total requested items. You may find that there are only a few companies that can provide two types of service and many that can provide one or the other. By permitting the award of these two items, or groups of items, you increase the number of companies that could submit a quote; increasing the chance of a lower total cost. In this case, you must specify precisely how you intend to make the award and which values on the Quote Schedule will be used in that evaluation.

Labor/Material Cost As described above, you may include additional lines for each offeror to breakdown their costs for each item. By default this template lists labor and material costs, though these may be removed or altered to fit the items or services you are purchasing.

SC End Product This only applies when purchasing items or goods. It may be deleted when purchasing a service. This should be listed under each item chart for which it is applicable.

US End Product See Above

Warranty This may be used as applicable and you may want to specify whether to include the manufacturer or supplier's warranty. It cannot be used in determining award, but does allow this information to be obtained up front.

Professional Affiliation This is optional; applying primarily to contractors performing work on-site (carpenters, plumbers, etc.). Collection of this information will assist in determining the ability of the offeror to perform the work (responsibility).

Insurance/Bonding This applies primarily to contractor's performing work on-site.

References This has also been included to help ensure that the contractor is capable of performing the work.

Note This applies to the purchase of items or goods and should be listed at the end of the Quote Schedule; or if not applicable, removed. It states that the vendor must notify you 24 hours prior to making the delivery. F.O.B destination, freight pre-

paid means that the vendor must pay for the delivery and you do not take ownership of the items until they have arrived at your location. The vendor will be held liable for the items prior to this point, should they be damaged in route. All deliveries must also be made inside unless you specify otherwise. This information may be altered or removed as applicable, but will not hurt anything to be left in.

SPECIFICATIONS

This section will include a description of those goods or services to be purchased, as well any special requirements the offeror must adhere to. It is important to include as much detail as possible to ensure that your needs are met and that each vendor will be submitting a quote based on the same criteria. Any details of the items being purchased, or the manner in which services are to be provided, that is left out will be left to the discretion of the contractor(s) receiving the award.

SOLICITATION VERIFICATION SHEET - QUOTES

This document acts as a checklist to make sure that all of the correct documents have been included in the contract file. The sheet should be printed out prior to releasing the solicitation so that the list can be followed as you work through the solicitation process. As each item is placed in the contract file, this sheet will be initialed and dated. Some of the items on this list are applicable only in some circumstances and can be crossed out if not necessary.

SCBO ADVERTISEMENT

Solicitations must be advertised in South Carolina Business Opportunities if they are anticipated to cost more than \$10,000.00. If, upon receiving quotes that were verbally solicited, it is found that the lowest quote is *over* \$10,000.00 an award should not be made. A written solicitation (either a Request For Quote or Invitation For Bid) must be sent to at least three vendors, including those who submitted a quote previously, and then be advertised in SCBO.

In order to advertise a solicitation in SCBO, you must fill out the applicable SCBO Advertisement Form. These forms can be found online at SCBO's website: <http://www.mmo.sc.gov/MMO/ops/MMO-scbo-index.phtm>.

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Once the form has been filled out, it should be e-mailed as an attachment to mlfowler@mmo.sc.gov. The e-mail should also include the date you wish to have the ad published.

SCBO is published each Monday and Thursday. For your ad to be published in the Monday edition, it must be submitted no later than noon Friday. Ads published on Thursday must be submitted no later than noon Wednesday.

The deadline for submitting a quote may not be less than seven days from the date the ad is to appear in SCBO.

AMENDMENTS

There are two circumstances under which an amendment would be issued.

You wish to change any portion of the solicitation after it has been issued.

or

You have received questions from vendors, without the answer to which, other vendors may be at a disadvantage when quoting a price.

For the most part, the first two pages of the amendment will be exactly the same as the Request For Quotes that was issued. In every circumstance, the date issued and amendment number will have to be altered. If the amendment is being issued to extend the submission date, then this too would be changed.

The third page of the amendment is where you will state the reason for its issuance.

For Example:

This amendment has been issued to extend the date by which to submit your offer to December 28, 2012 at 5:00 PM.

or

The following questions have been received in response to this solicitation:

When listing questions received, you need only list the question that was asked and your reply. If a change in the Quote Schedule is necessary, then it can be recreated within the amendment by copying the item charts from the Request For Quote Template.

Each offeror submitting a quote after an amendment has been issued, must also send a copy of any amendments issued with the quote. This is to ensure that each vendor is submitting quotes based on the same criteria. They must also acknowledge their receipt on Page Two of the Request For Quotes.

QUOTE TALLY SHEET

Once the deadline for submission has passed, each of the quotes received are tallied on the Quote Tally Sheet. You need only enter the Solicitation Number, Title, and the date the tallying is being done before printing it out. The remainder can be filled out by hand.

For each quote, you simply write the name of the vendor, check the In-State Preference box if they have made such a declaration on Page Two of the Request For Quotes, and write the price being used for evaluation on the Quote Schedule under Price. If for any of those items the vendor has declared them to be either a SC-End Product or US-End Product, then you would check the appropriate boxes. If you have chosen to categorize the items requested into lots, you may need to alter this form to include the evaluated costs for each lot.

After tallying each of the quotes, you would then check to see if any of the preferences, should there be any, need to be applied. If so, you would adjust the price of those quotes accordingly and write the new price under Adjusted Price.

Once all of the prices have been tallied, the individual tallying the quotes will initial the bottom right of the sheet. A second individual should also initial the bottom right corner after reviewing the document for accuracy.

Award will be made to vendor with the lowest Adjusted Price. Should lots be used to allow for multiple awards, then you would award each lot independently based on its own Adjusted Price.

Prior to issuing a purchase order, an award must first be made by issuing a Solicitation Award Document. Aside from sending a copy of the Award Document to each offeror, a copy must also be sent to the Consumer being served.

SOLICITATION AWARD DOCUMENT - RFQ

Issuing an award requires only that the form be filled out and sent to each of the vendors who submitted an offer. Information to be filled in will come directly from the Request For Quote document that was issued or from any applicable amendment that may have changed it.

This document must be signed by the Executive Director of the Board prior to being mailed out.

When listing the final price, the total for the entire quote must be listed. If there are multiple lots or items, these may also be listed separately if you should wish to do so. If listing by item, you should include a description of each. You may provide the applicable terminology.

If awards are being made to multiple vendors it is necessary to list each vendor receiving an award and the corresponding lot to which they submitted a successful quote. Vendors should not be sent an award document showing only the portion of the contract they were awarded, but also who was awarded the portion for which they were not successful.