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| **Quick Request Form can be found on the Procurement Site or give us a call to get started. On Average, it takes about 3 weeks to pull together a document to post on Merx; the entire process can take 2-6 months or longer depending on the complexity.** |
| **Required: Competitive bidding process is required to meet Policy 17 and trade agreement requirements.**  **Understand: RFP complexity, knowns/unknowns, timeline, roles and responsibilities, data gathering/decision making** |
| **Total Cost of Ownership variables, quality requirements, services required, implementation requirements, warranty, term, maintenance, support, normal operating fees, set-up, training, AODA considerations, Agreement Terms, etc.**  **Options: mandatory requirements, pass/fail, minimum passing score, Respondents meeting, format for response, Presentation/Demonstration etc.** |
| **Special needs for appendices, terms & conditions, evaluation criteria, weighting percentages, evaluation tools/scoring guides, reference check tools, Presentation/Demonstration tool/agenda, Bonfire** |
| **Merx options (email notification, viewable bid lists etc.)**  **Managing: Questions and Answers, Addendums to the RFP, Bid closing/extensions, compliance issues** |
| **Refer to:**  **-Evaluation Handbook**  **-Bonfire (online UW Evaluation tool) Note: Link below is active once you are set up as an evaluator in Bonfire.**  [**https://bonfirehub.zendesk.com/hc/en-us/articles/201896553-Evaluating-a-project-in-Bonfire-for-Evaluators-**](https://bonfirehub.zendesk.com/hc/en-us/articles/201896553-Evaluating-a-project-in-Bonfire-for-Evaluators-) |
| **Finalize Pricing and Agreement, Communicate Award’**  **Debrief with Respondents upon request**  **Requisition and Purchase Order** |
| **Your Procurement Lead will assist upon request when performance concerns are unresolved.**  **Advice on renewals is provided by your Procurement Lead** |

**Use this for Quick Form Request for purchases of goods and services over $100,000. Once completed, send the Quick Form Request to the RFP Coordinator:** [**Leah Gibson**](mailto:l5gibson@uwaterloo.ca)**. Once assigned, a Procurement Lead will be in touch with you to discuss your requirements and the University of Waterloo procurement process.**

Is this a request for Competitive Procurement (RFP/RFI/RFSQ) Choose an item.?

**Contact & Evaluation Information**

Department Name that will utilize the goods or services: Click or tap here to enter text.

Department Authorizer: Click or tap here to enter text.

Contact Person(s) (will be reviewing the documents/providing information): Click or tap here to enter text.

Evaluation Team Member Names (individuals who will be scoring the criteria in Bonfire):

Click or tap here to enter text.

**Project Information**

Project Title (the name on the bid document): Click or tap here to enter text.

What (description of goods and services to be procured): Click or tap here to enter text.

When: (anticipated start/receipt date): Click or tap to enter a date.

Projected spend/approved budget: Click or tap here to enter text.

Is an Agreement needed: Yes?  No?

If an Agreement is needed what is the length (# of years): Click or tap here to enter text.

Evaluation Criteria (Provide the percentage in each box for the criteria that are applicable – percentages must total to 100%:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Requirements**  %  : Click or tap here to enter text. | **Fees**  **%**  : Click or tap here to enter text. | **Other/Project Plan, Methodology & Timeline %**  : Click or tap here to enter text. | **Experience and Qualifications %**  : Click or tap here to enter text. | **Demonstrations/Presentation (if required) %**  : Click or tap here to enter text. |

**Timelines**

Below are average estimated lead times; a schedule will be completed in the RFP with corresponding dates. Your Procurement Lead will work with you to determine the RFP schedule.

RFP Document Preparation 14-21 days

MERX Posting/Advertising 25 days (required by legislation)

Evaluate & Award 7-21 days (approximate; dependent on complexity)