Prepare Documents

To tell potential suppliers what your requirements are, you will need to distribute quotation documents. These quotation documents need to include information that will help suppliers decide whether they wish to bid or not.

Invitation to Quote Documents

Your Invitation to Quote documents must, as a minimum, include the following:

Checklist

Checklist

Invitation to Quote Documents Checklist

Document	Description	Included?
Invitation to Quote Letter	A covering letter asking suppliers to bid. The Invitation to Quote Letter (ITQ) found below is an example document showing the type of information you can include.	
Brief	The document that includes your requirements for the procurement exercise. The Brief is an example template showing the type of information you can include. It is important to incude your evaluation criteria - including weightings - in your Brief.	

Your Organisations Terms and Conditions (T&C's) of Contract	These will be unique to your organisation and will differ depending on what is being ordered e.g. T&C's for services will differ from T&C's for goods. Many organisations hold T&C templates for your use. You should gain approval from your legal department and manager on what T&C's to use and whther clauses need to be added or removed.	
Any Other Information	Any information that may affect the supplier's quote should also be included in the ITQ document.	

Blank rows are provided for your use e.g. to add additional checklist items.

The content of the above templates can be changed to suit your individual requirements.

Organisations should ensure that all relevant procurement documents make reference to the **Data Protection Regulations** (DPR) and update their terms and conditions accordingly.

You should ask for legal advice to determine how **DPR** fits with your current quotation requirement and any other documentation used.

How Do I Publish my Invitation to Quote Documents?

Open or close

You should use the Quick Quote facility on the Public Contracts Scotland (PCS) website wherever possible when seeking quotation bids, ensuring you include the above documents..

If your Organisation does not use Quick Quote, you can also seek quotes in writing or by e-mail.

Issuing Quotation Clarifications or Further Information

Open or close

Suppliers may ask questions about the published Invitation to Quote documents. As a result, you may wish to issue further information or provide further clarification not contained within the original document.

In PCS Quick Quote, you can do this via an online bulletin board facility.

Alternatively you can provide clarifications or further information in writing or by e-mail.

If you have issued any clarifications, you should communicate all questions, answers and clarifications in writing to all bidders. This ensures that all bidders are treated fairly and in an open and transparent manner.

Care should be taken to remove all commercially sensitive information in this process e.g. names of potential suppliers, etc.

Invitation to Quote Timescales

Open or close

The time limit for quotation responses should reflect the complexity of the requirement and be sufficient for the supplier to make a considered response.

You should keep to your original timescales as included in your Brief document. In exceptional circumstances, you may choose to consider extending the deadline for receipt of quotations.

An example may be that you have had to issue a clarification/further information to all suppliers. As a result of this clarification, the suppliers now need more time to work on their quotation document, to be able to respond adequately.

Please remember to communicate any deadline extensions to **all** potential suppliers. It is advised that you consult with your local Procurement Team/CoE for further

guidance.

Checklist

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Have you Got Everything You Need?

Before carrying on, please check you've got everything you need.

- Evaluation criteria and weightings agreed and included in the your Brief document, prior to Invitation to Quote publication.
- Sign off from technical expert and senior management on evaluation criteria and all Invitation to Quote documents.
- Names and availability of those who will support the answer of supplier's technical or commercial questions
- Names and availability of those who will evaluate technical or commercial responses.

Any documents you need are listed below

Invitation to Quote Letter

(file type: doc)