

**Goods or Services: Invitation to Quote (ITQ) and “3 Quotes” Templates**

Buyer Instructions (Please delete this page, any highlighted buyer instructions and 3 Quotes template before issuing to suppliers)

Use the **ITQ template** to request quotations from suppliers for one-off purchases under £50,000.

Use the **“3 Quotes” template** (page 6) to record quotations and your purchase justification.

**If your purchase is £50,000 or above you must contact the** [**Procurement Office**](http://www.ed.ac.uk/procurement/about/contact-us)**.\***

Prior to purchasing, buyers must ensure that they obtain appropriate approvals under the University’s [Delegated Authority Schedule](http://www.docs.sasg.ed.ac.uk/GaSP/Governance/Governance/DelegatedAuthorisationSchedule.pdf) and should verify that their requirement is not already available through a [current internal service or contracted supplier](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/contracted-goods-and-services).

If you have any queries, please contact the [Procurement Office](http://www.ed.ac.uk/procurement/about/contact-us).

*Steps for buyers:*

1. *Edit the ITQ cover page and letter as required. In the letter, indicate the relevant version (goods, equipment, services, etc.) of the University’s* [*Terms and Conditions*](http://www.ed.ac.uk/procurement/supplying/terms-and-conditions-of-purchase) *that will apply.*
2. *In appendix 1, add a specification or description of your requirement. In appendix 2, edit headings where suppliers will submit their quality and price information.*
3. *Send the ITQs via email to at least 3 suppliers who you believe can meet your requirement, answer any relevant queries, and then receive and evaluate the quotations*.
4. *Select the winning quotation and record your justification (see “3 Quotes” template on page 6 below). While you are not obligated to select the cheapest option, you must record your reasoning (please use “3 Quotes” template on page 6 to record quotes and justification).*
5. *Follow local procedures to raise a purchase order and keep relevant documentation according to local document retention procedures.*

\*Some Schools and Colleges provide locally based support for procurements under £50,000; check [here](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/locally-based-support) to see contact info for included deparments.

Individuals who provide a personal service to the University via an intermediary such as an agency, partnership or their own Personal Service Company may be in the scope of IR35 tax rules. If you are procuring services that may fall into the scope of IR35, please use the alternative [IR35 ITQ template](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/ir35-tax-changes), as well as for any self-employed or “sole trader” service providers. Please see the [Procurement Office website](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/ir35-tax-changes) for more information on IR35.



**INVITATION TO QUOTE (ITQ):**

Insert good/service title

Ref: insert reference number if applicable

**KEY MILESTONES/DEADLINES:**

|  |  |
| --- | --- |
| 29th April 2017 | Issue of ITQ |
| 12.00 25th May 2017 | **Deadline for submission of quotes** |
| 25th May 2017 onwards | Review of quotes |
| 6th June 2017 | Orders placed\* |
| 18th July 2017 | Delivery\* |

**\*Please note the above dates are given as guidelines only and are subject to change**

Insert Date

Dear Supplier

**INVITATION TO QUOTE FOR (short description optional)**

You are invited by the University of Edinburgh to quote for the provision of as detailed below. Your quotation must be received by **the time and date specified on the front page of this document.** It is the responsibility of all suppliers to ensure that their quotation response is received no later than the appointed time. The University of Edinburgh may undertake not to consider quotations received after that time.

The University of Edinburgh are not bound to accept the lowest priced or any quote and shall not be bound to accept the supplier as sole supplier. Prices quoted shall remain fixed for the duration of the contract. Value Added Tax (VAT) should be shown separately and the VAT registration number given.

The location where services will be performed/goods will be delivered is insert address here.

If you cannot supply the exact equipment or service the University needs, you may suggest alternatives that meet the specification, whilst complying with any minimum standards and the primary outputs expected from equipment of this nature. Please clearly show the benefits of any such alternatives.

By providing us with a quotation you agree to be bound by the University of Edinburgh’s Equipment/Goods/IT Equipment/Services/Supply and Installation [Terms and Conditions](http://www.ed.ac.uk/procurement/supplying/terms-and-conditions-of-purchase)which will apply to any contract awarded to you after you have provided us with our quotation.

Enquiries and returns regarding this Invitation to Quote should be addressed to

Yours faithfully

Add your name here

Job Title

**ITQ Appendix 1: Specification**

Quantity (insert “N/A” if not applicable):

Description/Brief:BUYER INSTRUCTIONS: please describe requirement including any relevant considerations such as:

* quality info
* technical requirements
* experience
* insurance
* health and safety
* sustainability requirements, etc.

Request delivery terms as “Delivery Duty Paid (DDP).” Buyers can include multiple specifications.See [specification tips](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/how-to-write-a-specification) on the University website or [how to prepare a brief](https://www.procurementjourney.scot/route-1/route-1-prepare-brief) from the Procurement Journey for more info

Sustainability requirements (delete if not applicable):

**ITQ Appendix 2: Bidder quotation information**

BUYER INSTRUCTIONS: Select relevant option for bidder response, edit as required and delete non-relevant option. Price schedule given as an example, please amend or delete as appropriate. For more information about preparing and evaluating quotations please see the Scottish Procurement Journey [Prepare Quotation Documents](https://www.procurementjourney.scot/route-1/route-1-prepare-quotation-documents) and [Receive and Evaluate Responses](https://www.procurementjourney.scot/route-1/route-1-receive-and-evaluate-responses)

BIDDER INSTRUCTIONS: please use this form to you detail your quotation information

**Option 1:**

BIDDER INSTRUCTION: Please provide a quotation in your own format that meets the specification in Appendix 1.

**Option 2:**

**Bidder Details**

BIDDER INSTRUCTION: please provide relevant contact and company information

**Quality Information**

BIDDER INSTRUCTION: please describe how you will fulfill the requirement as detailed in the specification

**Cost Information**

BIDDER INSTRUCTION: please break down the proposed costs in the following manner

|  |  |
| --- | --- |
| Pricing Schedule |  |
| Goods-total material costs | £XXXX |
| Service-total net labour cost | £XXXX |
| Warranty | £XXXX |
| *Add additional costs as appropriate* |  |
| Subtotal | £XXXX |
| VAT | £XXXX |
| Total | £XXXX |



**Goods/Services:“3 Quotes” Below £50,000 Purchasing Template**

This form is a recommended template to help University staff to record their reasoning for choosing a particular supplier.

Please note that you should contact the Procurement team <http://www.ed.ac.uk/procurement/about/contact-us> if any of the following apply:

* If you any have queries
* For goods: If you anticipate spending more than £50,000 in the next 12 months (legal requirement)
* For services: If you anticipate spending more than £50,000 in the next four years (legal requirement)
* If this is an international purchase (for verification that your shipment terms are appropriate)
* If funding for the purchase has external funding auditing requirements
* If your department offers locally-based procurement support (see [contacts list](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/locally-based-support)), please check with your relevant contact before proceeding

For self-employed, sole trader, and IR35 intermediary service providers: Please use alternative [IR35 ITQ/3Q form](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/ir35-tax-changes) and, prior to obtaining quotes, complete [employee status questionnaire-future engagements](http://www.ed.ac.uk/finance/about/sections/payroll/payroll-forms) form on behalf of winning bidder and submit to the [Payroll Office](http://www.ed.ac.uk/finance/about/sections/payroll/contacts). See [Procurement Office website](http://www.ed.ac.uk/procurement/policies-procedures/how-to-buy-guidance-under-fifty-thousand/ir35-tax-changes) for more info.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Description of requirement: |  | | | | | | |
|  |  |  | |  |  | |
| Your name: |  | | Budget Code/Grant Number\*: | |  | | |
|  |  | | \*Delete as appropriate\* | |  | | |
| Budget holder name: |  | | Procurement Reference: | |  | | |
|  |  | | (If relevant) | |  | | |
| School/Department: |  | | IR35 check made by [Payroll](http://www.ed.ac.uk/finance/about/sections/payroll)? (If relevant) | | |  | |

**Quotes Received**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Supplier Name | Brief Description of product / service offered | Total Price  (Ex VAT) |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

**Successful Supplier & Reason for Decision:** (Please provide a clear reason for the decision. The chosen quote need not be the cheapest but rather the most appropriate)

|  |
| --- |
|  |

**If there are fewer than 3 suppliers please record your justification:** (e.g. Compatibility with existing equipment; no other supplier capable of meeting requirements for technical reasons etc. Note: higher value purchases require robust justification)

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| --- |
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