

EVALUATION FORM

INVITATIONAL COMPETITIVE PROCUREMENTS



INSTRUCTIONS

1. Complete this form for all **Invitational Competitive Procurements** (RFQ) valued from **\$20,000 - \$100,000** and **Second Stage Procurements** (Humber/OECM/Ministry VORs, etc.)
2. Have vendors complete the [Vendor Attestation Form \(humber.ca\)](http://humber.ca) and adjust scoring to provide an advantage to Ontario businesses.
3. Award the procurement according to the selected evaluation method, as identified on this form.
4. If the successful vendor **can** be determined based on price only:
 - (i) Populate section 3, Lowest Price Evaluation Method,
 - (ii) **Award to the vendor with the lowest Evaluated Price.**
5. If the successful vendor **cannot** be determined based on price only:
 - (i) Populate option 2, Pricing/Rated Criteria Evaluation Method,
 - (ii) Adjust Criteria and Available Points as required (Ontario Business Advantage must remain at 10% for an RFQ),
 - (iii) **Award to the vendor with the highest Total Score.**
6. When submitting the purchase requisition for this procurement, include:
 - (i) this Evaluation Form,
 - (ii) all Quotations,
 - (iii) all Vendor Attestation Forms.

1. Procurement Details

1. Procurement Details			
Sourcing Number		Project Name	
Date Procurement Opened		Collaboration used (Y/N)	
Date Procurement Closed		If yes, name & number of collaboration	
Numbers of Vendors Invited		If OECM, has CSA been completed?	
Preferred Vendor			
Vendor is BOBI compliant (Y/N)		Cost per year of contract (exclusive of applicable taxes)	
If No, explain		Total cost of contract (exclusive of applicable taxes)	

2. Procurement Description

EVALUATION FORM

INVITATIONAL COMPETITIVE PROCUREMENTS



3. Vendor Evaluation

[Purchasing Procedure Approved Nov 2022](#) should be consulted for specific procurement procedures prior to issuing requests to vendors.

Procurement Value	Number of Vendors Required
\$0 - \$20,000*	Minimum of one (1)
\$20,001 - \$100,000	Minimum of three (3) Invite all Vendors if the VOR list has less than three (3) Vendors – provide evidence of three (3) quotes to Purchasing
\$100,001 - \$250,000	Minimum of five (5) Invite all Vendors if the VOR list has less than five (5) Vendors
<\$250,000 but not to exceed the VOR ceiling limit set out in the VOR contract	Minimum of seven (7) Invite all Vendors if the VOR list has less than seven (7) Vendors. The value of the procurement will determine whether all Vendors on the VOR list must be invited to Bid.

*Low value procurements (<\$20,000) do not require an invitational procurement form to be completed, however a contract may still be required in order to proceed with the purchase. Please contact Humber's Legal team for more details.

A. RFQ (use option 1 or 2)

OPTION 1: Lowest Price Evaluation Method

	<vendor name>	<vendor name>	<vendor name>
	<Vendor Location>	<Vendor Location>	<Vendor Location>
¹ Quoted Price	\$	\$	\$
² Less: 10% Ontario Business Advantage			
³ Evaluated Price	\$	\$	\$

OPTION 2: Pricing/Rated Criteria Evaluation Method

⁴ Criteria	⁵ Available Points	<vendor name>	< vendor name>	< vendor name>
		<Vendor Location>	<Vendor Location>	<Vendor Location>
⁶ Price (Enter Cost)	\$			
Price (Points)	40			
Technical Specs	40			
Service/Delivery	5			
Ontario Business Advantage (%)	10			
Other (specify)	5			
Total Score	100			

¹ Please provide comparable values for each vendor, including delivery costs. For example, if Vendor A provided warranty per month and Vendor B provided warranty per year, please pro-rate Vendor A to obtain price per year.

² The 10% Ontario Business Advantage is given to vendors who attest to being an Ontario business on the [Vendor Attestation Form](#).

³ Evaluated Price for Ontario businesses is the quoted price less 10%. Evaluated Price for non-Ontario businesses is the quoted price. For example, if Vendor A bids \$120 and is a non-Ontario business, their Evaluated Price is \$120. If Vendor B bids \$150 and is an Ontario business, their Evaluated Price would be \$150 - 10% = \$135.

⁴ Criteria may be adjusted to match your procurement. The Ontario Business Advantage must remain at 10%.

⁵ Available Points for each criterion may be adjusted to match your procurement. The Ontario Business Advantage must remain at 10%.

⁶ Price is calculated as Lowest Price/Vendor Price*Available Points. For example, if Vendor A bids the lowest price at \$120, Vendor B bids \$150, and Price has 40 Available Points, Vendor B's Price score would be calculated as 120/150*40 = 32 points.

EVALUATION FORM
INVITATIONAL COMPETITIVE PROCUREMENTS



B. Second Stage Procurement (use option 1 or 2)

Add additional columns as needed to meet the minimum number of vendors required for a second stage procurement

OPTION 1: Lowest Price Evaluation Method

	Vendor One	Vendor Two	Vendor Three	Vendor Four	Vendor Five
	<vendor name>	<vendor name>	<vendor name>	<vendor name>	<vendor name>
	<Vendor Location>	<Vendor Location>	<Vendor Location>	<Vendor Location>	<Vendor Location>
Quoted Price	\$	\$	\$	\$	\$
Evaluated Price	\$	\$	\$	\$	\$

OPTION 2: Pricing/Rated Criteria Evaluation Method

Criteria	Available Points	<vendor name>	< vendor name>	< vendor name>
		<Vendor Location>	<Vendor Location>	<Vendor Location>
Price (Enter Cost)	\$			
Price (Points)	40			
Technical Specs	35			
BOBI (define as needed)	25			
Total Score	100			

4. Approvals

Requisitioner		Title		Signature		Date	
Admin Approval		Title		Signature		Date	
Buyer		Title		Signature		Date	
Purchasing Mgr		Title		Signature		Date	
For procurements greater than \$100,000 the following additional approvals are required							
A.D. Purchasing		Title		Signature		Date	
Director, FS		Title		Signature		Date	
Department VP		Title		Signature**		Date	
For procurements greater than \$250,000 the following additional approvals are required							
CFO		Title		Signature**		Date	
For procurements greater than \$1,000,000 the following additional approvals are required							
BOD		Title		Signature		Date	

**Requires EA initials