

Instructions for Preparation of University of Hawaii
Request for Quotation Form

a. General Guidelines

- 1) Treat all vendors fairly and equitably.
- 2) Provide sufficient time for the vendors to prepare a quotation. The length of time will vary with the particular circumstances and the vendor must not be "pressured" into preparing an insufficient or erroneous quotation. Quotations received via facsimile are acceptable.
- 3) The RFQ shall specify the date and hour for the desired reply date. Eliminate indefinite words such as "ASAP" or "reply immediately".
- 4) Quotations are confidential until the time and date set for receipt of all quotations and after evaluation of the quotations has been complete. At the time that the purchase order is issued, the quotations may be made available to the public, if requested.
- 5) Specify an adequate description which sets forth the minimum essential characteristics of the item required or the specific services the Contractor is required to perform. Unduly restrictive specifications that specify a particular feature of a product that is unique to one manufacturer shall not be used, unless the particular feature is required to meet the program's needs.

Brand name specification followed by the words "or acceptable alternate" may be used, but its use shall be limited as much as possible. If brand name specifications are used, it is recommended that more than one brand be named. When using brand name specifications, state the brand name(s) or catalog number(s).

- 6) If soliciting quotations for more than one item, state if award is to be made by item or by total aggregate amount.
- 7) State if delivery time is to be considered in award. This should only be used in emergency situations.

- 8) Quotations shall include all delivery charges and applicable taxes; recommended language is as follows: "All prices are f.o.b. (free on board) destination, including all applicable taxes."
- 9) Evaluate and award promptly. Keep in mind that many quotations have an expiration date. If the expenditure exceeds the fiscal officer's purchasing authority, the period of time that the quotation is available for acceptance must be sufficient to allow review by a designated departmental fiscal officer with greater purchasing authority or by OPRPRM, as applicable. (A8.250.11, Evaluation of Quotations and Award of Purchase Orders.)

b. Instructions for Preparation of an RFO Form

All appropriate spaces should be completed. If space is insufficient, attach a numbered list and make reference to it on the face of the form.

- 1) Return To - The office requesting the quotation.
- 2) Date - Date quotation issued.
- 3) Quotation No. - Identification number of quotation (if applicable).
- 4) Reply Must be Received by the University No Later Than - Date and time quotation must be received by issuing office to be considered for award. Eliminate indefinite words such as "ASAP" or "reply immediately".
- 5) Requisitioner - Name of requestor.
- 6) F.O. Initial - F.O. acknowledges that he/she has reviewed quotation prior to issuance.
- 7) Requisitioner's Telephone Number
- 8) Deliver To - State complete address of delivery point.
- 9) Ship Via - State method of shipment (e.g., UPS, Air, Parcel Post, Best Way, etc.) if necessary.

- 10) Date Delivery Required - The number of days after receipt of order (ARO) or the specific date delivery is required. The terms "ASAP" and "immediate" shall not be used. If delivery time is a factor to be considered in award, a statement to that effect must be included in the RFQ. This should only be used in emergency situations.
- 11) Vendor - Type vendor(s) name and address.
- 12) Item - List item number(s).
- 13) Quantity - State amount required, unit, dozen, etc.
- 14) Description - Provide a complete description of the goods or services required. If applicable, specify acceptable brand name(s) or acceptable alternate(s), model number(s) or catalog number(s). State if award is to be by items or total aggregate amount. State if delivery time is a factor in award.
- 15) Unit Price - Filled in by vendor.
- 16) Amount - Filled in by vendor.
- 17) All applicable taxes, freight and total filled in by vendor.
- 18) Attach the Business Classification Certification Statement (Attachment 295.4) to each Request for Quotation. The completed original certification statement should be forwarded to the OPRPRM in accordance with APM Section A8.295.4.
- 19) Rest of quotation to be completed by vendor.