



GUIDE TO PROCUREMENT USING THE REQUEST FOR QUOTATIONS METHOD

Government Procurement Services

Government of Montserrat

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List of Acronyms

Acronym	Definition
DPC	Departmental Procurement Committee
GOM	Government of Montserrat
GPS	Government Procurement Services
PE	Procuring Entity
RACI	Responsible Accountable Consulted Informed
RFQ	Request for Quotations
XCD	Eastern Caribbean Dollars

PART A: INTRODUCTION

1 Introduction

1.1 Purpose of guide

This guide is designed to provide public officers with easy-to-follow guidance on how to conduct procurement using the request for quotations (RFQ) method.

RFQ is a procurement method for lower value goods, works and services (below Eastern Caribbean Dollars (XCD) 125,000). It is faster and less formal than open or restricted tendering and therefore offers a more efficient approach for straightforward, lower value procurement.

However, tendering methods may still be used for procurement below XCD 125,000 where there is a reason to do this.

1.2 Legal framework

Public procurement in Montserrat is governed by:

- the Public Procurement Act 2025 (the “Act”); and
- the Public Procurement Regulations 2025 (the “Regulations”).

This guide is issued by Government Procurement Services (GPS) under section 10 of the Act to provide procuring entities (PEs) with the necessary guidance and direction to implement procurement using the RFQ method.

GPS has issued separate guides which provide an overview of the public procurement system, guidance on procurement planning, other methods of procurement and contract award and management.

GPS has also adopted standard tender documents, contract forms and other procurement forms and templates. The use of these documents is mandatory and this guide provides advice on which documents should be used for the RFQ method.

The Act and Regulations can be downloaded from <https://tenders.gov.ms/publications>. All other documents are available from GPS by emailing procurement@gov.ms.

In the event of any discrepancies, the Act and Regulations take precedence over this guide and the standard documents. Any queries or suggestions for updates to this guide or the standard documents should be addressed to the Head of GPS.

1.3 Application

The Act, Regulations and this guide apply to all PEs, including ministries, departments, units and subdivisions of the Government of Montserrat (GOM) that engage in procurement.

Government owned entities are required to follow this guide, unless they have their own procurement rules or regulations, approved by the Cabinet on the recommendation of the Public Procurement Board.

For guidance on donor funded procurement and exemptions to the Act, refer to the Guide to the Public Procurement System.

PART B: OVERVIEW OF THE RFQ METHOD

2 Overview of the request for quotations method

2.1 When to use request for quotations

RFQ may be used to purchase goods, works or services with a value below XCD 125,000, providing they are readily available from an established market.

Therefore, RFQ is not suitable for non-standard items, such as those specifically produced to a particular specification, or where there is a very limited number of suppliers. For these types of purchase, use an open or restricted tendering method.

You are not permitted to use RFQ for the procurement of consulting services; instead, use the request for proposals method.

While the value of an individual purchase may be below the threshold for use of RFQ, frequent purchases of the same or similar items should be consolidated during procurement planning. Combining similar purchases into a single contract can reduce the administrative effort of repeated procurements and allow GOM to secure better value for money.

Have you considered using a framework agreement?

Where there is a recurrent need for the same or similar requirements, consider using a framework agreement. If the precise nature, quantity or timing of requirements isn't known, a framework agreement allows you to define these details later when an order is placed.

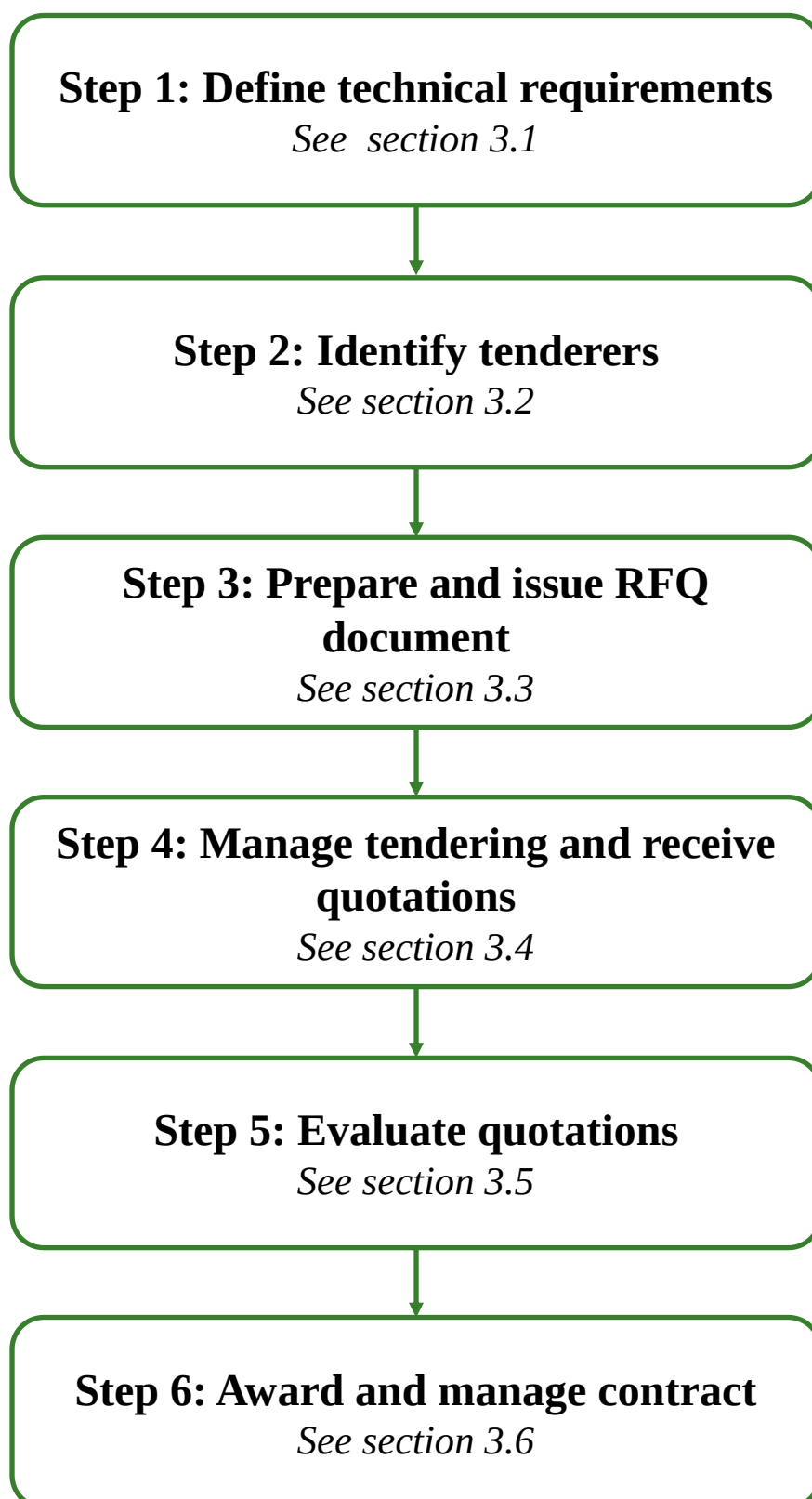
➔ See the **Guide to Framework Agreements** for more information.

2.2 Steps in the RFQ process

The RFQ method is less formal than using tendering methods but follows the same basic steps of defining requirements, tendering, evaluation, contract award and contract management. The flowchart on the next page shows the main steps in the RFQ process. Section 3 of this guide gives further information on each step in the process.

References and templates:

- Section 26 of the Public Procurement Act 2025
- Regulation 23 of the Public Procurement Regulations 2025
- Request for quotations document for goods
- Request for quotations document for works
- Request for quotations document for services
- Forms for solicitation approval, evaluation report and clarification letters



2.3 Roles and responsibilities

The chart below shows who does what in the RFQ process by defining who is Responsible Accountable Consulted or Informed (RACI). It lists all tasks and assigns specific roles for each task, as explained in the table below:

R	Responsible	Does the work
A	Accountable	Owens the result and signs off
C	Consulted	Provides input before or during the task
I	Informed	Kept updated about decisions or progress

TASK	PE			GPS		Departmental Procurement Committee	Tenderer
	Accounting Officer (or as delegated)	End user or other PE staff	Evaluation Panel	Procurement staff	Head of GPS		
Prepare description of technical requirements	A	R					
Identify tenderers to invite	A	R		C	C		
Prepare RFQ document	A	R		C	C		
Approve RFQ document ¹	R	I			R		
Issue RFQ document	A	R		I	I		I
Request any clarifications		I					R
Prepare and issue clarifications to tenderers	A	R		C	C		I
Receive quotations	A	R					I

¹ Approval of the RFQ document by GPS is only required for procurement with an estimated value of more than ECD 100,000.

OVERVIEW OF THE REQUEST FOR QUOTATIONS METHOD

Open quotations	A	I				R	
Appoint evaluation panel	A	I	I			R	
Evaluate quotations and prepare evaluation report	A	I	R				
Approve evaluation report	A	I	I			R	
Award contract and notify unsuccessful tenderers	A	R					I

PART C: THE RFQ PROCESS

3 The request for quotations process

3.1 Step 1: Define technical requirements

Prepare a description of your requirements. The structure and content will be different for each type of procurement i.e. for goods, works or services.

You should also calculate the estimated value of the proposed contract. Ensure that this is below XCD 125,000 before proceeding with an RFQ process.

- See the **Guide to Procurement Planning** for how to define your technical requirements and calculate the estimated value.

3.2 Step 2: Identify tenderers

Under the RFQ method, quotations are invited directly from suppliers by email or in other written form. There is no requirement to advertise the procurement.

Quotations must be invited from at least three suppliers, unless you are unable to identify three. Where you are unable to identify three suppliers, contact GPS for advice.

You may invite quotations from more than three suppliers. It is recommended to invite more than three as some suppliers may not submit a quotation.

Use the GPS Supplier Register to identify potential suppliers for all categories of goods, works and services included on the register.

Where the GPS Supplier Register doesn't include at least three suppliers, identify additional suppliers. This may be done based on past contracts, your knowledge of the market or other sources of information. Other sources may include:

- other procuring entities who buy the goods, works or services, whether based in Montserrat or other countries
- chambers of commerce, trade or professional associations
- trade or industry directories, journals or publications
- embassies or development partners
- external technical experts (providing they have no conflict of interest)
- online searches for suppliers.

3.3 Step 3: Prepare and issue RFQ document

The purpose of the RFQ document is to provide tenderers with all the information they need to prepare and submit responsive quotations. It includes:

- a description of the goods, works or services required, including quantities;
- instructions on the RFQ process;
- standard forms for preparing quotations;
- the evaluation criteria to be applied; and
- a draft contract.

GPS has issued three different RFQ templates designed for goods, for works and for services.

Use the **standard RFQ document (for goods, works or services)** to prepare your RFQ document:

- Follow the guidance notes in *[green italics]* to insert relevant information or delete parts that are not needed
- Do not change standard text in black font
- **Remember to delete all guidance notes before issuing the document to tenderers.**

Ensure that the quotation deadline included is at least seven days after issue of the RFQ document. This is the minimum tendering period, but you may include longer.

Use the **Solicitation Approval form** to record approval of your RFQ document before it is issued. The form is not required if the estimated value of the procurement is XCD 50,000 or less.

Issue the approved RFQ document to all identified suppliers at the same time. The RFQ document should normally be issued by email. It is good practice to request an automatic confirmation of receipt of the email.

3.4 Step 4: Manage tendering and receive quotations

During the tendering period you must respond promptly to any requests for clarification received from tenderers. Where a request for clarification is received:

- ensure that it was received, in writing, before the deadline for clarifications stated in the RFQ document: do not respond to any requests for clarification which are not in writing or received late;
- prepare a written response which must answer the question(s) without identifying the tenderer who asked the question(s);
- assign numbers to clarification responses so that tenderers can ensure they have received all clarifications;
- issue the clarification to all tenderers at the same time in the same way as the original RFQ document was issued.

Many quotations will be submitted electronically through <https://mytenders.co.uk/>. The system will automatically record the time and date of receipt and keep electronic quotations secure until the quotation deadline.

Where a tenderer submits its quotation in hard copy, you must:

- keep a record of all quotations received, marking the name of the tenderer, the date and time of receipt and which member of staff received the quotation;
- keep all quotations, unopened, in a secure location where they cannot be accessed by anyone not involved in the procurement process;
- deliver the unopened quotations to the evaluation panel following the quotation deadline.

3.5 Step 5: Evaluate quotations

The evaluation panel must work together to evaluate quotations and identify the lowest-priced quotation which meets the procuring entity's needs.

Use the evaluation criteria listed in section 2 of the RFQ document as the basis for the evaluation. Evaluate quotations in the following three stages.

- **a preliminary examination** to determine whether quotations are substantially responsive to the requirements of the RFQ document, have been properly signed and are generally in order and whether tenderers meet the eligibility (and any qualification) criteria listed in the RFQ document;
- **a technical evaluation** to determine whether quotations meet the technical requirements of the RFQ document without material deviation; and
- **a financial evaluation** to compare prices and determine the lowest priced, substantially responsive quotation.

You must reject quotations with material deviations!

A material deviation is one which would detrimentally affect the scope, quality or performance of the goods, works or services or would change the supplier's risk and responsibilities under the contract.

A quotation is considered to be substantially responsive if it conforms to all the terms, conditions and specifications of the RFQ document without material deviation or reservations.

Reject quotations which are not substantially responsive at any stage of the evaluation.

You may request clarifications from tenderers where there are minor deviations in a quotation or errors or oversights that can be corrected without touching on the substance of the quotation. Do not request a clarification where there is a material deviation.

Any clarification must be requested in writing, using the **clarification letter** template. The request and the response must be recorded in the evaluation report. Where the estimated value of the procurement is over XCD 100,000, GPS will assist with requesting clarifications from tenderers.

You must correct arithmetical errors in quotations following the procedure listed in section 1 of the RFQ document. Where any corrections are made, ask the tenderer to accept the correction through a clarification request. Where the tenderer does not accept the correction, you must reject the quotation.

Use the **Evaluation Report template for request for quotations** to record the results of the evaluation. Use all relevant standard text and follow the guidance notes to insert, edit or delete information specific to your evaluation.

The evaluation report template contains evaluation grids for each stage of the evaluation. These are designed to match the evaluation criteria typically included in RFQ documents, but you must edit the criteria to match the RFQ document used. Delete any criteria which do not apply to the RFQ document issued.

For the financial evaluation, use the **financial evaluation table for request for quotations** which is an Excel spreadsheet to support automatic calculations. Insert a copy of the spreadsheet into the appendix containing the financial evaluation.

The successful quotation will be the lowest-priced quotation which meets all the requirements in the RFQ document.

Tips on using the Evaluation Report template

- Start by aligning the criteria in the evaluation grids in the appendices with your RFQ document
- Next complete the evaluation grids in order: these will take you through the three stages of evaluation
- Then complete the main text which summarises the evaluation
- All members of the evaluation panel must sign the completed evaluation report.

Negotiations are not permitted under the RFQ method.

3.6 Step 6: Award and manage contract

Submit the evaluation report to the DPC for approval of the contract award recommendation.

Following approval:

- for contracts with a value of XCD 100,000 or more, issue a notice of intention to award to all tenderers who submitted a quotation and wait for the expiry of the standstill period;
- debrief tenderers on request;
- issue a contract to the successful tenderer, using the draft contract in section 4 of the RFQ document;
- for contracts with a value greater than XCD 100,000, publish a contract award notice;

A contract manager will be designated to ensure the signing and mobilisation of the contract and to manage the contract through to completion.

- See the **Guide to Contract Award and Management** for more detailed guidance on how to award and manage contracts.