Vendor Recommendation Email Template

Instructions: Following the evaluation of your procurement and before the offer of a contract or Purchase Order can be issued to a selected vendor, employees are required to complete each of the sections below and provide the content in an email to the Approving Authority as defined by the OAR and based on the Total Procurement Value of the contract/PO.

BRIEF SUMMARY

Provide a brief summary of the procurement that was conducted. Consider including the following content:

- How the quotes/proposals were solicited and what the response was (eg. An RFP was posted publicly and the IESO received 3 submissions; or An RFQ was issued by invitation to 3 qualified vendors);
- A brief description of the objectives of the procurement; and
- A brief description of the methodology used to solicit responses (eg. Proponents were provided with a description of the anticipated project and were requested to provide a lump sum fee to complete the scope of work; or Proponents were provided a general description of the services that may be required over the term of the contract and were requested to provide hourly rates for key personnel; etc.).

TECHNICAL EVALUATION RESULTS

If applicable (ie. where factors other than price were considered) provide a brief summary of what technical requirements were reviewed and what the results of that evaluation were. Where available, provide a copy of the evaluation scorecard as back-up.

Consider including details such as:

- A brief description of what technical criteria was reviewed (eg. "Proponents were evaluated on the personnel's skill, experience and qualification in providing X, Y and Z along with the submission of a project plan");
- Any minimum score criteria used; and
- The results of the technical evaluation. Consider using a table such as the following:

Vendor Name	Technical Score

FINANCIAL EVALUATION RESULTS

Provide details of the financial evaluation. Update the price category to match the method used. For more complex pricing that includes multiple price factors or rates (such as hourly rates or unit rates), you may use the final price score in place of the vendor's submitted pricing.

Vendor Name	Price

CONTRACT, TERM AND PRICING DETAILS

- Provide the Total Procurement Value of the contract or Purchase Order;
- Identify whether a standalone contract or a PO will be used;
- Outline the contract term and, if applicable, any price increases that will be allowed (eg. "Hourly rates will be subject to CPI increases annually on the anniversary date of the agreement)

AWARD RECOMMENDATION

Identify the recommendation you are making and the rationale for making it. Eg. "Based on the highest overall score by the evaluation team, we recommend that a contract be awarded to Vendor A"

APPROVAL

Include a request for approval. Eg. "In consideration of the above mentioned, please indicate your approval of this recommendation and confirm that we can proceed with an offer of an Agreement to the selected vendor."

If you are also requesting that the final contract document be signed by an individual other than the Approving Authority, include a request to delegate that execution. For example:
"Please also indicate your approval to delegate the execution of the contract to [Jane Doe]"