

CFI Supplier Quote Checklist¹

The following are criteria that may be relevant to any particular competitive bid process, and are especially helpful when making purchases from a CFI grant. If applicable, this checklist may be shared with suppliers when seeking quotations for goods and/or services and should be attached to the Purchase Order request.

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| 1. Can all Specifications be met? If not, clearly indicate the differences on a separate page. | Y / N n/a |
| 2. Has the regular educational discount been identified? | Y / N n/a |
| 3. Are in-kind contributions, as defined by CFI, identified? | Y / N n/a |
| 4. Does the equipment meet applicable Electrical standards? | Y / N n/a |
| 5. Does the equipment contain any radioactive materials? | Y / N n/a |
| 6. Has a list of spare parts and associated costs been provided? | Y / N n/a |
| 7. Can installation be provided? | Y / N n/a |
| a) Included in the cost? | Y / N n/a |
| b) If not included, indicate any additional costs: _____ | |
| 8. Can training be provided? | Y / N n/a |
| a) Included in the cost? | Y / N n/a |
| b) If not included, indicate any additional costs: _____ | |
| 9. Is travel required to perform installation and/or training? | Y / N n/a |
| a) Included in the cost? | Y / N n/a |
| b) If not included, indicate any additional costs: _____ | |
| 10. Has extended warranty pricing been identified? | Y / N n/a |
| 11. Has the Equipment, Utility and Environmental Requirement form been completed? | Y / N n/a |
| 12. Have after warranty maintenance fees been quoted? | Y / N n/a |
| 13. If software, are upgrades included? | Y / N n/a |
| a) If not included, indicate any additional costs: _____ | |
| 14. If software, are there license fees or user fees? | Y / N n/a |
| a) If yes, indicate any additional costs: _____ | |
| 15. Is equipment or software documentation included in the cost? | Y / N n/a |
| a) If not included, indicate any additional costs: _____ | |

16. Has the F.O.B. point been identified? Y / N n/a
a) Is freight and insurance included? Y / N n/a
b) If not included, indicate the additional cost: _____
17. Are discount payment terms identified? Y / N n/a
18. If currency other than Canadian funds is being quoted, is this clearly identified? Y / N n/a
19. For non-Canadian suppliers, if on-site services are required including installation/setup, training, or other, has Non Resident Withholding Tax requirements been considered? Y / N n/a
20. Will quotation be valid for the requested period? Y / N n/a
c) If not, indicate the validity period: _____

Additional Information:

¹ Reference: CFI Best Practices Guide at www.innovation.ca/sites/default/files/essential_documents/2009_cfi_share_e.pdf