**CFI Request for Quotation**

**(This is not an order)**

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| **Project Leader/CFI Project #:**  **Date:**  **Department/Academic Unit**  **Tel:**  **Fax:**  **E-mail:** |

**1.0 Purpose of this Form**

**This Request for Quotation (RFQ) is for a Canada Foundation for Innovation (CFI) grant application. Lakehead University is requesting budgetary quotes to determine the value of the equipment requested in the grant application. Please note that quotations will not be considered unless this document is returned completed and signed.**

**2.0 Background Information**

The CFI was created by the Government of Canada in 1997 to fund research infrastructure. The CFI’s mandate is to enhance the capacity of Canadian universities, colleges, research hospitals, and non-profit research institutions to carry out world-class research and technology development that benefits Canadians. To achieve its mandate, the CFI invests in research infrastructure jointly with institutions and their funding partners (for example, the Ontario Ministry of Research, Innovation, and Science).

The CFI provides funding up to 40% of the total eligible costs of the infrastructure projects it supports and the Province of Ontario (through the Ministry of Economic Development, Job Creation and Trade’s Ontario Research Fund*)* also funds up to 40% of the total eligible costs. Combined, the CFI and the Province provide funding up to a maximum of 80 percent. The remaining 20% must be provided by the institution(s), and / or eligible funding partners.

Voluntary in-kind contributions from responding suppliers will be recognized as eligible partner funding. Such contributions may be given by the responding suppliers when an item is quoted/sold to the institution below their “normal educational price”.

This RQF is to assist a Lakehead University researcher in the development of a CFI application. The values received as a result of this RFQ will be used in the application for a CFI Grant and therefore must comply with the CFI’s requirements regarding acceptable contributions to an infrastructure project.

When responding to this RFQ, suppliers must therefore consider that the CFI approval process may involve a lengthy timeline that may extend as long as eighteen (18) months or more.

It is important that those responding provide quotes that reflect the normal educational discount and, if offered, a further in-kind contribution that would represent a best and final offer.

Therefore, suppliers must provide a breakdown of their list price, the normal and educational discounts, the normal educational price, the amount of in-kind contribution (if any) and the net selling price.

**3.0 Definitions**

**To help ensure the accuracy of the pricing information, the following definitions are provided**:

**Normal Discount:**

A discount normally offered to the institution, taking into consideration factors such as the institution’s current volume of transactions and location. A discount for early settlement or for settlement in cash is considered to be a normal discount.

**Educational Discount:** A discount offered to the institution due to its educational status.

**Normal Educational Price:**

The price that would normally have been charged to the institution after normal and educational discounts, but prior to any discount offered as a contribution towards the CFI-funded purchase or project.

**In-kind Contribution:**

A non-monetary resource that an external supplier offers as a contribution towards a CFI- funded project. It may include the value, in whole or in part, of eligible capital items (i.e. equipment, accessories/options and software), or non-capital items (i.e. extended warranties, delivery, installation costs and training) that are needed to bring the infrastructure into service. The in-kind contribution is equal to the best normal educational price, less the net selling price (if any).

**Net Selling Price:** The cash consideration payable by the University.

**4.0 Instructions**

Please include in your quote the in-kind contributions that your company will be offering. These offerings may be in the form of cash discounts that are over and above normal educational discounts, for both new or used equipment or other offerings such as extended warranties, consumable supplies, installation, maintenance, upgrades, tech support, training, shipping charges or any other service that would normally have a monetary value and not normally be bundled with the items being quoted. **Please note that in-kind contributions are not required, but the values of the in-kind offer will be included in the evaluation of the overall offer**. **As well, please note that if the list price and the normal educational prices are the same, Respondents should provide a statement in their response to explain the rationale behind their pricing**.

Please see the **Pricing Table** for the preferred format of your quote.

Note that the normal educational price and the in-kind contribution will be reviewed for reasonableness.

Suppliers should ensure that they provide accurate pricing information. The CFI does not endorse the procurement of infrastructure that results in an overestimation of the value of the item and of the in-kind contribution. Suppliers should familiarize themselves with the CFI guidelines located within the CFI Policy and Program Guide available on the CFI website https://www.innovation.ca/. See clauses 4.6, 4.9 and 6.5 in particular.

Suppliers must include all related charges such as installation, training, shipping costs and warranties if applicable.

Suppliers must also indicate the fair market value for all donations made in the form of equipment, accessories, shipping costs, additional warranties and training.

**5.0 Pricing Table**

**Net pricing must be all inclusive (installation, freight, licensing fees, assembly and commissioning)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Item# 1** | **Item# 2** | **Item# 3** | **Item# 4** |
| **Description** |  |  |  |  |
| **Quantity** |  |  |  |  |
| **Unit of Measure** |  |  |  |  |
| **List price** |  |  |  |  |
| **Less: Normal discount** |  |  |  |  |
| **Less: Educational discount** |  |  |  |  |
| **Price after normal and educational discounts**  **(Normal educational price)** |  |  |  |  |
| **Less: In-kind contribution** |  |  |  |  |
| **Net selling price** |  |  |  |  |
| **Percentage in-kind contribution** |  |  |  |  |
|  |  |  |  |  |

**\*If list price is equal to your academic price, please add a note to your quotation indicating that your organization does not provide academic discounts**

Note that the normal educational price and the in-kind contributions may be reviewed for reasonableness. It is also possible that the CFI will audit this information. Suppliers should ensure that they provide accurate pricing information, in line with the definitions provided above. The CFI does not endorse the procurement of infrastructure that results in an overestimation of the value of the item and of the in-kind contribution.

|  |
| --- |
| **Suppliers can quote on any one or all of the items.** |

**Suppliers Must Complete/Confirm the following Information:**

|  |
| --- |
| F.O.B. Lakehead University |
| Shipping Charges: Included [ ] Extra [ ] Cost: $ |
| Method of Shipping: |

|  |  |
| --- | --- |
| Name of Firm: | |
| I hereby certify that the pricing information provided are in line with the definitions provided in the RFQ and that this information is accurate as supported by current practices and conditions.  Name of Responding Individual and Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature: | |
| Vendor Quote Reference: | e-mail address: |
| Telephone number: | Fax Number: |

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| --- | --- |
| Term: NET 30 DAYS | **Do not include HST in the quote**. |
| Suppliers may offer alternatives that in their opinion equal or exceed the technical or performance standards of the quoted reference. Suppliers will be required to fully demonstrate that their proposed products meet or exceed the specifications provided. In evaluating quotations, Lakehead University’s selection committee will carefully consider alternates offered by that supplier and will confirm acceptance or rejection of alternates. | |
| Electrical Units must be CSA approved or have Acceptable Electrical Certification Marks in Ontario as Listed at: [Search for an Approval Mark - ESA (esasafe.com)](https://esasafe.com/electrical-products/recognized-certification-marks/) | |
| Please respond by e-mail to: | |

* It is the vendor’s responsibility to obtain CSA certification, ULC labels and approvals or equivalent, or arrange and pay for an inspection by the Electrical Safety Authority, special inspections division. Please indicate if the equipment is CSA and ESA approved (All equipment must meet legislated standards and externally bear a mark or label approved by the Standards Council of Canada or equivalent. (i.e., ULC, CSA, FDA). Any modifications required are the supplier’s responsibility.
* All other charges including packaging, handling, or documentation must be specified.
* Any proposal not supported by the information requested in this RFQ, or not complying with this RFQ, may be considered non-compliant.
* This RFQ is part of a competitive procurement process, which helps to serve the best interests of Lakehead University. With an RFQ, price may or may not be the determining factor. Any award will be made to the supplier(s)) whose proposal is determined to be the most advantageous to the University.
* Lakehead University reserves the right, at the time of evaluation of any proposal to request any additional information that it deems necessary in order to make a decision on any proposed offer.
* Lakehead University reserves the right to reject any or all proposals after evaluation. The University may at its own discretion, invite one or more suppliers (s) to participate in negotiations.
* If unable to bid, please return this form and indicate reason.

**6.0 Questionnaire**

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| --- | --- | --- | --- | --- |
| **No** | **Questions to be answered and returned with your quotation.** | **Tick**  **if YES** | **Tick if**  **NO** | **Comments**  **If “No”** |
| 1 | Quotation in Canadian Dollars? |  |  |  |
| 2 | Are safety permits or other certification required? |  |  |  |
| 3 | Does your equipment meet electrical code for Ontario, Canada (i.e. CSA mark or label) |  |  |  |
| 3 | Are your warranties clearly described? |  |  |  |
| 4 | Is your quotation valid for at least **90 days**? |  |  |  |
| 5 | Have you identified delivery and freight costs? |  |  |  |
| 6 | Have you included your specification information? |  |  |  |
| 7 | Have you clearly identified the in-kind value? |  |  |  |