

HONG KONG RED CROSS - Purchase-By-Quotation Form

SU: _____ Source of Fund: _____ (☐ Required stricter quotation limit by funding body)

Financial limit – Above \$5,000 - \$30,000 : 2 verbal quotations / Above \$30,000 - \$50,000: 2 written quotations / Above \$50,000 - \$200,000: 5 written quotations / Above \$200,000: 5 written quotations OR Specified number of tenders (please refer to the FIN1003 – Quotation Matrix)

Note: Approval MUST be sought before placing order(s)

No.	Supplier Information		Procurement Item(s) Description	Qty	Unit Price \$	Total Amount \$	Type of Quotation “✓”		Date of Quotation	Recommended Quotation “✓”
							Written	Verbal		
1.	Name :	Contact Person :								
		Tel :								
2.	Name :	Contact Person :								
		Tel :								
3.	Name :	Contact Person :								
		Tel :								
4.	Name :	Contact Person :								
		Tel :								
5.	Name :	Contact Person :								
		Tel :								

1) If the recommended quotation i) NOT the lowest offer or, ii) NOT meeting the required number of quotations, please state with reasons:

2) Recommend to regular supplier? : ☐ Yes, and the effective period is from _____ to _____ (effective within 1 year or less only)

(The purchase from regular supplier during the period must be restricted within the same range (or lower) of the financial limit as state above.)

3) Please make sure that Procurement Checklist has been completed with proper justification and approval (if any).

We, declare that we do not notice any conflict of interest for the above quotation. For any conflict of interest noted, we have reported properly.

Quotation obtained by: _____ Name: _____ Post: _____ Signature: _____ Date: _____

Approved by: _____ Name: _____ Post: _____ Signature: _____ Date: _____

Approval from Heads (if applicable) and “CEO/SG or Directors” should be sought when:

1. Quotation is ABOVE HK\$200,000;

*Additional approval from **Higher Level Approver** should be sought when:*

1. Accepted offer is not the lowest quotation

2. NOT meeting the required number of quotations.

Additional _____ Date: _____

Approved by: Name & Post: _____

Procurement Checklist

Note: The list below is not exhaustive and User should refer to the latest version of “Internal Control Guidelines on Procurement (FIN1003)”

No	Stage	Considerations	Reference in FIN1003	Yes*	No*	If No, please provide justifications and approval sought (if any)
1	Needs identification	Reasonable efforts have been exercised to identify items required before requesting quotation.	1	<input type="checkbox"/>	<input type="checkbox"/>	
2	Mode of Procurement	Procurement Item(s) does not require to be procured centrally by CS and ITS.	6	<input type="checkbox"/>	<input type="checkbox"/>	
3	Validity of Quotation	Sufficient quotations have been obtained based on the total contract value and nature of the Procurement Item(s).	1 and 10	<input type="checkbox"/>	<input type="checkbox"/>	
		Specifications have been prepared to encourage open and fair competition and all the required information has been provided in the quotation request to all invited bidders.	3.1	<input type="checkbox"/>	<input type="checkbox"/>	
		Sufficient time (minimum 3 working days) has been given to those invited bidders for submitting their quotations. All quotations are received <u>on or before</u> the closing date and time set. (<i>Late quotation should not be accepted for fairness to all bidders.</i>). User should provide the Specifications and other supporting documents (e.g. e-mail correspondence with bidders) to FINM for requesting and receiving quotations from invited bidders.	3.2	<input type="checkbox"/>	<input type="checkbox"/>	
		Repeat order (if applicable) is placed within the Quotation Validity Period. Aggregate value of ALL orders is within the financial limit in the approved PBQ and a copy of the approved PBQ and quotation will be provided to FINM for payment processing.	5	<input type="checkbox"/>	<input type="checkbox"/>	
4	Offer Evaluation	Quotations have been obtained in an acceptable form and are comparable.	3.3 and 3.4	<input type="checkbox"/>	<input type="checkbox"/>	
5	Order placement	Order is placed within the Quotation Validity Period. (If not please initiate a new PBQ.)	3.6	<input type="checkbox"/>	<input type="checkbox"/>	
6	Declaration	No conflict of interest requires to report and declare.	7	<input type="checkbox"/>	<input type="checkbox"/>	

		No gift or advantage is received from supplier.	8	<input type="checkbox"/>	<input type="checkbox"/>	
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***Please check ☒ as appropriate.**