

**From:** Ellison, Aaron aellison@fas.harvard.edu  
**Subject:** RE: Funding Signature Required: BTLGID  
**Date:** January 4, 2016 at 7:55 PM  
**To:** Lau, Matthew K. matthewklau@fas.harvard.edu

AE

thanks for staying on top of this.

A.

---

**From:** Lau, Matthew K.  
**Sent:** Monday, January 4, 2016 17:32  
**To:** Bowlen, Jeannette  
**Cc:** Ellison, Aaron  
**Subject:** Re: Funding Signature Required: BTLGID

Hi Jeanette, hope you had a nice winter holiday.

Is all of the paperwork processed for the Broad Institute Work Order?

Best,

Matt

On Dec 15, 2015, at 9:08 AM, Lau, Matthew <[matthewklau@fas.harvard.edu](mailto:matthewklau@fas.harvard.edu)> wrote:

Thanks Jeanette!

Matt

On Dec 15, 2015, at 8:00 AM, Bowlen, Jeannette  
<[bowlen@fas.harvard.edu](mailto:bowlen@fas.harvard.edu)> wrote:

Aaron-

Please sign the work order/PO and Vendor Justification which I left in your mailbox. A debarment certificate (required for purchases >\$25,000 using federal funds) was sent to Broad Institute. Once I have signatures on all three items, the order will be placed.

Jeannette

---

**From:** Ellison, Aaron  
**Sent:** Monday, December 14, 2015 11:11 AM  
**To:** Bowlen, Jeannette  
**Cc:** Lau, Matthew K.  
**Subject:** RE: Funding Signature Required: BTLGID

Hi Jeannette

in Seattle,

Can you please process this work order/PO to the Broad Institute, and sequencing work, charge to Ant Dimensions? I can sign paperwork if needed on Tuesday night (leave in my box), or you can use the stamp that Lisa has.

All questions to Matt.

Thanks!  
Aaron

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**From:** Lau, Matthew K.  
**Sent:** Monday, December 14, 2015 11:05  
**To:** Ellison, Aaron  
**Subject:** Fwd: Funding Signature Required: BTLGID

Hey Aaron, here???s the work order for the sequencing run. Please fill it out when you get a chance, let me know if you have any questions.

Thanks!  
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Begin forwarded message:

**From:** Quote Server Support <[quote-support@broadinstitute.org](mailto:quote-support@broadinstitute.org)>  
**Subject:** Funding Signature Required: BTLGID  
**Date:** December 11, 2015 at 2:08:13 PM EST  
**To:** <[matthewklau@fas.harvard.edu](mailto:matthewklau@fas.harvard.edu)>  
**Cc:** <[jboch@broadinstitute.org](mailto:jboch@broadinstitute.org)>, <[ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)>  
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Project Manager: James Bochicchio, Caroline Cusick Quote:  
BTLGID: Six Sample extractions, six fragment Library  
Constructions, and six lanes of sequencing on a HiSeq 2500 up to  
200 cycles  
Thank you, Quote Server @ Broad Institute of MIT and  
Harvard <https://www.broadinstitute.org/quotes/>

**From:** Lau, Matthew K. matthewklau@fas.harvard.edu  
**Subject:** Re: Funding Signature Required: BTLGID  
**Date:** January 4, 2016 at 5:32 PM  
**To:** Bowlen, Jeannette bowlen@fas.harvard.edu  
**Cc:** Aaron M Ellison aellison@fas.harvard.edu



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**From:** Bowlen, Jeannette [bowlen@fas.harvard.edu](mailto:bowlen@fas.harvard.edu)  
**Subject:** RE: Funding Signature Required: BTLGID  
**Date:** December 14, 2015 at 2:06 PM  
**To:** Lau, Matthew K. [matthewklau@fas.harvard.edu](mailto:matthewklau@fas.harvard.edu)  
**Cc:** Ellison, Aaron [aellison@fas.harvard.edu](mailto:aellison@fas.harvard.edu)

JB

Thank you.

Jeannette

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**From:** Lau, Matthew K.  
**Sent:** Monday, December 14, 2015 1:51 PM  
**To:** Bowlen, Jeannette  
**Cc:** Ellison, Aaron  
**Subject:** Re: Funding Signature Required: BTLGID

Hi Jeanette, see attached pdf's for both the quote (file starting with "BTLGID") and the vendor justification.

Thanks,

Matt

On Dec 14, 2015, at 1:32 PM, Bowlen, Jeannette <[bowlen@fas.harvard.edu](mailto:bowlen@fas.harvard.edu)> wrote:

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<vendor\_justification\_writable.pdf>

From: Lau, Matthew K. matthewklau@fas.harvard.edu  
Subject: Re: Funding Signature Required: BTLGID  
Date: December 14, 2015 at 1:50 PM  
To: Bowlen, Jeannette bowlen@fas.harvard.edu  
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BTLGID6015335  
84425...31.pdf

## HARVARD UNIVERSITY VENDOR JUSTIFICATION/PRICE VERIFICATION FORM

TUB AND ORG NAME: 370 FAS Core ACCT.CODE: DATE: Tub/Org/Object/Fund/Activity/Sub-Activity/Root  
WEB VOUCHER NO: VENDOR: ☒ Grant ☐ Contract ☐ Cooperative Agreement ☐ OTA (please check one)

Harvard University requires vendor selection justification and price verification for orders over \$5,000 purchased with Government funds in the 100,000-199,999 fund code range. Please check "Funding Instrument Code" at bottom of Action Memo. Check the appropriate boxes below and file this form with your departmental award records. Call the Procurement Management Compliance Officer at 495-5431 if you have any questions regarding this form.

**ALL PURCHASES Under \$5,000** All Sub-\$5,000 purchases made with Federal funds may be subject to a Federal audit at any time. All such purchases should be made prudently and subject to fair and reasonable pricing. Internal documentation such as purchase orders, invoices, copies of competitive quotes or proposals, or cost/price analysis should be retained as justification of reasonable pricing for items under \$5,000. A justification for sole source selection should also be retained.

**CONTRACTS \$5,000 & Over** Competitive bidding is required for each and every purchase \$5,000 and over. Please complete Section A. If only one bid is received, indicate bidder on Section A and complete Section C. For non-competitive purchases (i.e. sole/selected source, University-wide agreements, blanket orders) complete Section B and Section C.

**GRANTS \$5,000-\$9,999** Price analysis is required for each and every purchase. For purchases \$5,000 and over, please complete Section C.

**\$10,000 & Over** Requires: 1) basis for vendor selection 2) justification for sole or selected source 3) basis for award price for each purchase \$10,000 and over. Please complete Section A or Section B, and Section C.

### SECTION A

**Lowest Competitive Bid** (same item priced differently by several vendors). Record oral or written quotations below.

Retain copies of bids/quotation in department files for audit purposes.

Vendor A Broad Institute	Total price \$30,028.48
Vendor B	Total price
Vendor C	Total price

### SECTION B

If the lowest bidder was **not** chosen, select **ONE**:

☐ **Selected Source** (alternative vendors exist, but vendor selection was based on a) *technical* requirements (e.g. precision, reliability, etc.) or b) *past performance* of alternative vendors (poor service level, unavailability of parts, etc.). Identify other sources considered and on what basis they were rejected. Explain: \_\_\_\_\_

☒ **Sole Source** (no other company is known to be capable of fully satisfying requirement). Explain: After an extensive internet search and electronic inquiries, this was the only vendor that could generate genomic sequence data that also had previous experience with insect model systems.

Retain vendor selection documentation in department files.

### SECTION C

**Cost/ Price Analysis** Select **one or more** of the following statements to indicate that the bid price was fair and reasonable.

☐ The quoted prices incorporate discounts not available to the general public and reflect substantial savings (e.g. University-wide Harvard

<input type="checkbox"/> The quoted prices incorporate discounts not available to the general public and reflect substantial savings (e.g. University-wide Harvard contract prices, <b>negotiated pricing, or vendor partnership agreements</b> ).		
<input type="checkbox"/> The quoted prices compare favorably to previous prices paid for the same or similar items on Web Voucher No. _____ Dated _____		
<input checked="" type="checkbox"/> The quoted prices compare favorably to Harvard in-house estimates (e.g. University Information Systems, <b>University Operations Services, etc.</b> ) for similar items.		
<input type="checkbox"/> The quoted prices were reviewed as part of Harvard's overall proposal by the federal sponsoring agency and were found to be acceptable.		
<input type="checkbox"/> The vendor has stated that the quoted prices are no greater than those charged to the vendor's most favored customer.		
<input type="checkbox"/> The price was obtained from a current catalogue or standard printed price list.		
<input type="checkbox"/> Other: (i.e. Cost Analysis for construction projects) _____		
<b>Department Authorization</b> (Signature of the department buyer who initiated the purchase)		
Name (please print) _____		Signature _____ Date _____
Telephone Number: _____		Email Address: _____
Revised 4/2003		

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<https://www.broadinstitute.org/quotes/>

## HARVARD UNIVERSITY VENDOR JUSTIFICATION/PRICE VERIFICATION FORM

TUB AND ORG NAME: 370 FAS Core ACCT.CODE: \_\_\_\_\_ DATE: \_\_\_\_\_  
Tub/Org/Object/Fund/Activity/Sub-Activity/Root  
WEB VOUCHER NO: \_\_\_\_\_ VENDOR: \_\_\_\_\_ ☒ Grant ☐ Contract ☐ Cooperative Agreement ☐ OTA (please check one)

Harvard University **requires** vendor selection justification and price verification for orders over \$5,000 purchased with Government funds in the 100,000-199,999 fund code range. Please check "Funding Instrument Code" at bottom of Action Memo. Check the appropriate boxes below and file this form with your departmental award records. Call the Procurement Management Compliance Officer at 495-5431 if you have any questions regarding this form.

<b>ALL PURCHASES Under \$5,000</b>	All Sub-\$5,000 purchases made with Federal funds may be subject to a Federal audit at any time. All such purchases should be made prudently and subject to fair and reasonable pricing. Internal documentation such as purchase orders, invoices, copies of competitive quotes or proposals, or cost/price analysis should be retained as justification of reasonable pricing for items under \$5,000. A justification for sole source selection should also be retained.
<b>CONTRACTS \$5,000 &amp; Over</b>	Competitive bidding is required for each and every purchase \$5,000 and over. Please complete <u>Section A</u> . If only one bid is received, indicate bidder on <u>Section A</u> and complete <u>Section C</u> . For non-competitive purchases (i.e. sole/selected source, University-wide agreements, blanket orders) complete <u>Section B</u> and <u>Section C</u> .
<b>GRANTS \$5,000-\$9,999</b>	Price analysis is required for each and every purchase. For purchases \$5,000 and over, please complete <u>Section C</u> .
<b>\$10,000 &amp; Over</b>	<b>Requires:</b> 1) basis for vendor selection 2) justification for sole or selected source 3) basis for award price for each purchase \$10,000 and over. Please complete <u>Section A</u> <u>or</u> <u>Section B</u> , and <u>Section C</u> .

### SECTION A

**Lowest Competitive Bid** (same item priced differently by several vendors). Record oral or written quotations below.  
Retain copies of bids/quotations in department files for audit purposes.

Vendor A _____	Total price _____
Vendor B _____	Total price _____
Vendor C _____	Total price _____

### SECTION B

If the lowest bidder was **not** chosen, select **ONE**:

☐ **Selected Source** (alternative vendors exist, but vendor selection was based on a) *technical* requirements (e.g. precision, reliability, etc.) *or* b) *past performance* of alternative vendors (poor service level, unavailability of parts, etc.). Identify other sources considered and on what basis they were selected. Explain:

What basis they were rejected. Explain: \_\_\_\_\_

☐ **Sole Source** (no other company is known to be capable of fully satisfying requirement). Explain: \_\_\_\_\_

Retain vendor selection documentation in department files.

### SECTION C

**Cost/ Price Analysis** Select **one or more** of the following statements to indicate that the bid price was fair and reasonable.

- ☐ The quoted prices incorporate discounts not available to the general public and reflect substantial savings (e.g. University-wide Harvard contract prices, **negotiated pricing, or vendor partnership agreements**).
- ☐ The quoted prices compare favorably to previous prices paid for the same or similar items on Web Voucher No. \_\_\_\_\_  
Dated \_\_\_\_\_
- ☐ The quoted prices compare favorably to Harvard in-house estimates (e.g. University Information Systems, **University Operations Services, etc.**) for similar items.
- ☐ The quoted prices were reviewed as part of Harvard's overall proposal by the federal sponsoring agency and were found to be acceptable.
- ☐ The vendor has stated that the quoted prices are no greater than those charged to the vendor's most favored customer.
- ☐ The price was obtained from a current catalogue or standard printed price list.
- ☐ Other: (i.e. Cost Analysis for construction projects) \_\_\_\_\_

**Department Authorization** (Signature of the department buyer who initiated the purchase)

Name (please print) \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Revised 4/2003

**From:** Ellison, Aaron aellison@fas.harvard.edu  
**Subject:** RE: Funding Signature Required: BTLGID  
**Date:** December 14, 2015 at 11:11 AM  
**To:** Bowlen, Jeannette bowlen@fas.harvard.edu  
**Cc:** Lau, Matthew K. matthewklau@fas.harvard.edu

AE

Hi Jeannette,

Can you please process this work order/PO to the Broad Institute, ant sequencing work, charge to Ant Dimensions? I can sign paperwork if needed on Tuesday night (leave in my box), or you can use the stamp that Lisa has.

All questions to Matt.

Thanks!

Aaron

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**From:** Lau, Matthew K.  
**Sent:** Monday, December 14, 2015 11:05  
**To:** Ellison, Aaron  
**Subject:** Fwd: Funding Signature Required: BTLGID

Hey Aaron, here???s the work order for the sequencing run. Please fill it out when you get a chance, let me know if you have any questions.

Thanks!

m

Begin forwarded message:

**From:** Quote Server Support <[quote-support@broadinstitute.org](mailto:quote-support@broadinstitute.org)>  
**Subject:** Funding Signature Required: BTLGID  
**Date:** December 11, 2015 at 2:08:13 PM EST  
**To:** <[matthewklau@fas.harvard.edu](mailto:matthewklau@fas.harvard.edu)>  
**Cc:** <[jboch@broadinstitute.org](mailto:jboch@broadinstitute.org)>, <[ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)>  
**Reply-To:** <[jboch@broadinstitute.org](mailto:jboch@broadinstitute.org)>, <[ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)>

Dear investigator,

Funding information is required for your recent quote with the Broad Institute. The link below will bring you to a funding information page. Please review the information provided and fill out all required information to fund your quote. This page will expire in two weeks (01/11/2016).

If you have any questions or concerns about the information on this page or the work to be completed at the Broad Institute please contact [jboch@broadinstitute.org](mailto:jboch@broadinstitute.org), [ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)

Funding Page: [Click here to sign the quote electronically.](#)

Project Manager: James Bochicchio, Caroline Cusick Quote: BTLGID: Six Sample extractions, six fragment Library Constructions, and six lanes of sequencing on a HiSeq 2500 up to 200 cycles

Thank you, Quote Server @ Broad Institute of MIT and Harvard  
<https://www.broadinstitute.org/quotes/>

**From:** Lau, Matthew K. matthewklau@fas.harvard.edu   
**Subject:** Fwd: Funding Signature Required: BTLGID  
**Date:** December 14, 2015 at 11:05 AM  
**To:** Aaron M Ellison aellison@fas.harvard.edu



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Thanks!  
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**To:** <[matthewklau@fas.harvard.edu](mailto:matthewklau@fas.harvard.edu)>  
**Cc:** <[jboch@broadinstitute.org](mailto:jboch@broadinstitute.org)>, <[ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)>  
**Reply-To:** <[jboch@broadinstitute.org](mailto:jboch@broadinstitute.org)>, <[ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)>

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Quote: BTLGID: Six Sample extractions, six fragment Library Constructions, and six lanes of sequencing on a HiSeq 2500 up to 200 cycles

Thank you, Quote Server @ Broad Institute of MIT and Harvard  
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84425...31.pdf



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**Cc:** [jboch@broadinstitute.org](mailto:jboch@broadinstitute.org), [ccusick@broadinstitute.org](mailto:ccusick@broadinstitute.org)

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BTLGID: Six Sample extractions, six fragment Library  
Constructions, and six lanes of sequencing on a HiSeq 2500  
up to 200 cycles

Thank you, Quote Server @ Broad Institute of MIT and Harvard



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84425...31.pdf

