

RESEARCH PROCUREMENT SUPPLIER SELECTION FORM

The Federal Government requires that all purchases with a value greater than \$10,000.00 must have competitive bidding, a justification as to the supplier choice, and price verification. Partners has elected to apply this requirement to all categories of Research funding including Federal, Foundation and Industry awards as well as Research gifts and internal support. Sponsored project funding for Healthcare and other Social Service programs is considered Research for purposes of this policy. Federal grants and cooperative agreements, and all non-federal Research funding sources are subject to the procurement thresholds listed below. **Federal contracts are subject to the Federal Acquisition Regulation (FAR) with a lower threshold of \$3,500 and a lower Small Purchase Threshold of \$150,000.**** This form must be completed to obtain approval. Check the appropriate boxes and complete the information.

Requestor:	Date:
PI:	Fund number:
PI Email: <input type="text" value="Click to Submit"/>	Transaction value:
DA:	
DA Email:	

Conflict of Interest Attestation (To be completed by PI)

COI Question for Uniform Guidance SOPs (based on §200.318 (c)(1) and Partners COI Policy)
 Do any of the following individuals or organizations have any (1) financial or other interests in, or (2) tangible personal benefit from, the supplier being considered for this contract that exceeds \$10,000/year?

- You
- Your family member (spouse, domestic partner, or dependent children)
- An organization that employs or is about to employ you or your family member.

NO YES

Do you know of any violation of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting this Federal award?

NO YES

Purchase Type

Small Purchase \$10,000 - \$250,000

For procurement of goods or services greater than \$10,000 but less than \$250,000, department should conduct market analysis and obtain at least two quotes from established suppliers. The quotes can be screen shots from online suppliers, written or documented verbal conversations. All supporting documentation needs to be uploaded into PeopleSoft request.

Supplier A	Total price
Supplier B	Total price
Supplier C	Total price

Competitive purchase greater than \$250,00

For procurement of goods or services greater than \$250,000, the department should conduct market analysis and solicit formal proposals from a minimum of two qualified suppliers and establish clear evaluation criteria. Formal proposals from suppliers should be on supplier letterhead. All supporting documentation needs to be uploaded into PeopleSoft request.

Supplier A	Total price
Supplier B	Total price
Supplier C	Total price

Sole Source – No other company is known to be capable of fully satisfying the requirements

Partners HealthCare defines sole source as a designation for a vendor whose product or service is unique and, to the best of the user's knowledge, the vendor is the only known source (worldwide) from whom the product or service can be purchased. Partners has identified four paths to determine sole source:

Sponsor directed purchases: Supporting documentation should include Budget justification letter and copy of notice of award.

Previously vetted justification: Continuity of science requires documentation of previous purchase history

Non-vetted option: Requires justification letter from PI regarding why this is scientifically relevant to previous purchase

Public emergency: Partners HealthCare may elect procurement by Public Emergency in limited circumstances arising from a directive of the United States Department of Health and Human Services, the Massachusetts Department of Public Health, or similar agency due to an epidemic or similar scenario. Procurement by public emergency requires documentation of the sponsoring agency directive.

Summary description of the proposed transaction

Sole Source Justification workflow

1. Has selected supplier been used previously as documented sole source supplier YES NO
 - a. If yes: same grant YES NO
 - i. If yes please provide previous PO transaction number _____
 - ii. If no, please explain scientific need to utilize same supplier for current purchase. _____
 - b. If no: how does this selection apply to the current research – explain below

2. Is the use of this vendor identified in the grant application and included in the budget justification? YES NO
If yes: include budget justification referencing the use of this vendor and copy of award notice.
All supporting documentation needs to be uploaded into PeopleSoft request.
 - a. If no: continue below

3. What other suppliers were identified and considered to determine potential compatibility for this purchase?

4. What criteria was used to eliminate potential suppliers and conclude selected supplier is uniquely qualified?