



Single/Sole Source Justification Form

Department/School: _____ Requisition Number: _____

Department Head: _____ Date: _____

Sole Source means that a single vendor is uniquely qualified to meet the department or school's procurement objective and therefore the purchase should be exempt from the competitive bid process.

The **Sole Source Justification Form** is to be used by departments and schools to document sole source purchases, in an effort to stay in compliance with Shelby County Schools policy and procedures. If a department or school has determined that their purchase qualifies as a sole source, follow the instruction below:

- Request a quote from the vendor and obtain the vendors/manufacture sole source letter. If vendor has any terms and conditions related to the product or service please retain this information and ensure that the information is attached to your request form.
- Initiate a requisition using APECS and electronically attach your completed sole source justification form along with the vendor's sole source letter, quote references terms and condition as an attachment.

A purchase order will be sent to the vendor when the requisition has received all applicable internal department/school and procurement approvals.

Fill In you requested Single/Sole Source Product/Service information below:

1. State The Relevance Of Purchase To Your Department/School: (Purpose and Estimated Cost/Price)

2. Identify Items Or Services To Be Approved For Sole Source Treatment:

3. Name Of Manufacturer Of Item(s) (if applicable):

4. Name of Single Source Supplier:

Mailing Address:

Phone Number:

Fax Number:

Web Site Address (if available):

5. If Purchase Related To Compatibility With Existing Equipment, Then Identify The Item(s) And Asset Tag Number(s) of Equipment:

6. SOLE SOURCE CONSIDERATIONS - (Mark The One That Best Qualifies)

- A. Exclusive Rights . . . Item or service under patent or copyright held by a single vendor and item or service possesses functions or capabilities critical to use. (Complete Sections 7 & 8 and attach patent/copyright info)
- B. Exclusive Design . . . Item or service possesses a unique function or capability critical in the use of the item or service and not available from any other sources. (Complete Sections 7 & 8)
- C. Replacement Equipment . . . The purchase is for equipment associated with use of existing equipment where compatibility is essential for integrity of results. (Complete Sections 5, 7 & 8)
- D. Replacement Parts . . . The purchase is for replacement parts needed for repair of existing equipment where compatibility with equipment from the original manufacturer is paramount. (Complete Sections 5 & 7)
- E. Replacement Accessories . . . The purchase is for accessories sought for enhancement of existing equipment where compatibility with equipment from the original manufacturer is paramount. (Complete Section 5, 7 & 8)
- F. Technical Service . . . The purchase is for technical services associated with the assembly, installation or servicing of equipment of a highly technical or specialized nature. (Provide detail in Section 8)
- G. Continuation Of Prior Work . . . Additional item, service or work required, but not known to have been needed when the original order was placed with vendor, and it is not feasible or practicable to contract separately for the additional need. (Provide detail in Section 8)
- H. Other . . . (Complete Sections 7 & 8) FOR PROFESSIONAL, PERSONAL, CONSULTING and SOCIAL SERVICES CONTRACTS ONLY:
- I. Federal or state grant names vendor as condition of funding. (Attach copy of grant that names vendor)
- J. Vendor is specifically designated by state appropriation. (Attach page from appropriation)

7. SOLE SOURCE DISTRIBUTION - (Mark One That Qualifies)

- A. The item or service is manufactured, produced or developed by entity, or entity holds exclusive rights to item or service, and entity solely transacts (sells) direct to the customer. (There are no dealers or distributors for entity)
- B. The item or service is manufactured or produced by entity, or entity holds exclusive rights to item or service, and entity does not sell direct to the customer. Entity solely distributes the item or service through only one dealer or distributor in the world, United States, region, or identified market area.

Note: If item or service available from more than one source, the item or service may be treated as proprietary, but must be competitively solicited from multiple (two or more) sources.

ATTACH SIGNED LETTER OR EMAIL FROM MANUFACTURER, PRODUCER OR RIGHTS HOLDER OR INCLUDE STATEMENT ON FIRM PRICE QUOTATION SUBSTANTIATING SELECTION "A" OR "B" ABOVE.

8. DETAILED JUSTIFICATION FOR NO COMPETITION. (Please be precise in your explanation and include justification of **why** SCS should acquire the product or service through non-competitive negotiation. Please identify any reasonable, competitive procurement alternatives and explain why that product/service method will not work for your department/school)

9. FIRM PRICE QUOTATION

Attach a firm price quotation from the sole source or sole dealer/distributor pricing the product(s) or service(s) identified in section 2. Quoted prices shall be firm for 30-90 days and inclusive of all costs including transportation. Quote FOB.

Requestor	Request Approved By
Name _____	Name _____
Date _____	Date _____
Title _____	Title _____
Email Address _____	
Telephone Number _____	

COMPLETION OF THIS FORM DOES NOT GUARANTEE THE APPROVAL OF THE PROCUREMENT REQUEST. PROCUREMENT SERVICES RESERVES THE RIGHT TO COMPLETIVELY BID, NEGOTIATE OR TO SOLICIT ADDITIONAL INFORMATION AND REMAIN THE FINAL AUTHORITY ON ALL PROCUREMENT ISSUES. ATTACH THIS COMPLETED FORM TO YOUR REQUISITION REQUEST IN THE SCS APECS SYSTEM.