

## **Sole Source Request**

### **ALL SOLE SOURCE PROCUREMENTS MUST BE PRE-APPROVED USING THIS FORM**

- **This completed form must be submitted to and be approved by the District Procurement Officer or the Board of Education before contract negotiation or creation.**
- **Sole source procurement is permitted where there is only one source for the procurement item OR the item is needed for trial use or testing to determine if it will benefit the District. An urgent or unexpected circumstance or need for a procurement item does NOT justify sole source procurement.**
- **Complete each section of this form, providing as much information as needed to fully respond**

Provide a detailed description of the service or product to be procured, including total dollar value (with, if applicable, the actual or estimated life cycle cost of maintenance and service agreements):

Identify the justification or justifications for sole source procurement and complete the corresponding section or sections (check all that apply).

\_\_\_\_\_ There is only one source for the procurement item. (Section 1)

\_\_\_\_\_ This is a procurement of public utility services. (Section 1)

\_\_\_\_\_ Compatibility of equipment, technology, software, accessories, replacement parts, or service is the most important consideration. (Section 1, Section 2)

\_\_\_\_\_ Transition costs are unreasonable or cost prohibitive. (Section 1, Section 2)

\_\_\_\_\_ The item is needed for trial use or testing. (Section 3)

## Section 1: General Information

1. What characteristics of this item justify a sole source procurement?  
(Provide a detailed explanation of why this item is only available from a single source).
2. Could the specifications reasonably be modified to allow for competition?  
Explain.
3. Describe the market research which has been done before arriving at the sole source recommendation.
4. Identify similar vendors contacted regarding the needed procurement item and summarize the information received from those vendors.
5. Completely describe any personal, financial, or fiduciary relationship between the requester and the recommended vendor.

## Section 2: Compatibility / Transitional Costs

1. Provide a detailed description of the existing equipment, technology, software, accessories, or service with which the proposed procurement item must be compatible.
2. Identify the procurement method used to obtain the existing item.
3. Provide the purchase price and the date of purchase for the existing item.
4. What is the actual or estimated remaining life expectancy of the existing item?
5. Describe by nature and amount the transitional costs which would be incurred in moving to a different item. (Transitional costs are the costs of changing from an existing provider or from one type of item to another, including training costs, conversion costs, compatibility costs, system downtime, disruption of service, staff time needed to effect the transition, installation costs, professional services, and ancillary software, hardware, equipment, or construction costs.)

### Section 3: Trial or Testing

1. Why is trial use or testing necessary?
2. What is the anticipated end result of the trial or test?
3. Do any other similar vendors provide this product or service?
  - a. If yes, list the names of the vendors:
  - b. Will the products or services of the other vendors also be tested?
4. What criteria were used to select the requested vendor?
5. Describe the scope, size, and location of the test or trial.
6. What is the proposed period of trial use or testing? (This period may not exceed 18 months.)
7. Does the proposed contract comply with the requirements of Policy CFB for trial use contracts?