



Preparing Students for Success

Purchasing Department

SOLE SOURCE REQUEST FORM

Sole Source Procurement is appropriate only if a purchase requirement is reasonably available from a single supplier or if it otherwise qualifies under the attached Utah Procurement Administrative Rule, R33-3-401.

ALL SOLE SOURCE REQUESTS OVER \$1,000 MUST BE APPROVED BY THE PURCHASING AGENT BEFORE A PURCHASE ORDER CAN BE ISSUED.

Note: Use the Tab key to advance to the next field

Department/School Requesting Authorization:

Contact Person:

Title:

Email:

Product or Service to be purchased:

Sole Source Supplier:

Contact Person:

Address:

Phone Number:

Email Address:

Vendor Number:

Complete the following if no vendor number exists.

Federal Tax ID/SSN:

Type of Supplier: corporation partnership proprietorship government other

Remit To Address:

Fax Number:

Web Page Address:

It is anticipated the procurement will result in a:

District Contract

Email this form to jewalker@wsd.net prior to contract negotiations. No purchase requisition (PR) number is required. Request term of contract (include any renewal options).

Purchase Order

Submit a purchase requisition (PR) in IFAS, email this form along with a copy of the vendor's quotation to jewalker@wsd.net or attach to the PR in POUPPR.

The Sole Source Request is based on which of the following (check all that apply):

- Equipment/Service is only available from a single supplier in the U.S. (complete section A)
- Compatibility of equipment/service (complete sections A and B)
- Trial or Testing (complete section C)
- Purchased items are for resale
- Other (complete section A)

SECTION A - GENERAL INFORMATION

1. What is unique about this product or service to justify a sole source?
2. Could the product/service be reasonably modified to allow for competition?
3. Explain the market research performed to make the sole source recommendation.
4. List the names of other suppliers contacted, contact person and a summary of their response.
5. Does the requestor have any personal, financial or fiduciary relationship with the recommended supplier?
 Yes No (If 'Yes' a complete disclosure statement must be included with this request).

SECTION B - COMPATIBILITY OF EQUIPMENT/SERVICE

1. Describe the existing equipment that this purchase must be compatible with, include the original purchase price and date of purchase.
2. What is the remaining life expectancy of the existing equipment?
3. What procurement method was used to purchase the existing product/service? (Bid, RFP, Sole Source, etc.)
Provide the solicitation number or other reference material.

SECTION C - TRIAL OR TESTING

1. Why is the trial use or testing necessary?
2. What is the anticipated end result of the trial or test?
3. Do any other suppliers provide this product or service? Yes No
If 'Yes':
 - a. List the company names.
 - b. Will any of their products be tested? Yes No, if 'no' why not?
4. What criteria were used to choose this supplier?
5. What is the scope/size and location within the district of this test or trial?

R33-3-4 Sole Source Procurement

3-401 Conditions For Use of Sole Source Procurement

Sole source procurement shall be used only if a requirement is reasonably available from a single supplier. A requirement for a particular proprietary item does not justify sole source procurement if there is more than one potential bidder or offeror for that item.

Examples of circumstances which could necessitate sole source procurement are:

- (1) where the compatibility of equipment, accessories, replacement parts, or service is the paramount consideration;
- (2) where a sole supplier's item is needed for trial use or testing;
- (3) procurement of items for resale;
- (4) procurement of public utility services.

The determination as to whether a procurement shall be made as a sole source shall be made by the procurement officer. Each request shall be submitted in writing by the using agency. The officer may specify the application of the determination and its duration. In cases of reasonable doubt, competition should be solicited. Any request by a using agency that a procurement be restricted to one potential contractor shall be accompanied by an explanation as to why no other will be suitable or acceptable to meet the need.

3-402 Negotiation in Sole Source Procurement

The procurement officer shall conduct negotiations, as appropriate, as to price, delivery, and terms.

Requested by:

Approved:

Authorized Signature
Title:

Date

Jeff Walker
Purchasing Agent

Date