

**UINTAH SCHOOL DISTRICT
Purchasing Department**

SINGLE/SOLE SOURCE REQUEST

Date Approved: _____

Expiration Date: _____

Review Date: _____

Instructions: Prior to obligating the district to any purchase, school or department administrators seeking approval to make a single/sole source purchase (waiver of competitive bid process) must first complete this form and submit it to the Purchasing Office for approval along with applicable documentation. A single/sole source request is appropriate only if a purchase requirement is reasonably available from a single or sole provider or if it otherwise qualifies under the attached Utah Administrative Code R33-3-401. All single/sole source requests of \$1,000 or greater must be pre-approved by the Purchasing Office. Requests missing information will be denied and returned to the requestor for completion.

It is anticipated this purchase will result in a (check one):

District Purchase Order

School Purchase Order

District Contract

Requesting School/Department: _____

Contact Person & Title: _____

Email Address: _____

Phone/Fax Number: _____

Requisition Number: _____

Product/Service to be Purchased: _____

Est. Cost: _____

Recommended Supplier: _____

(Complete this section if not an already existing vendor in Fiscal)

Address: _____

Phone/Fax Number: _____

Contact Person: _____

E-mail Address: _____

Complete the following information (check one):

Corporation

Partnership

Sole Proprietor/Individual

Government

Medical Provider

Other: _____

Federal Tax ID # (TIN): _____

If Sole Proprietor/Individual, Social Security Number: _____

Single/Sole source request is based on the following (check all that apply):

- Compatibility of equipment/service (complete sections A & B)
- Trial or testing (complete section C)
- Equipment/service is only available from a single/sole supplier in U.S. (complete section A)
- Compatibility of professional services (complete section A)

Complete the applicable section(s) in as much detail as possible. Attach a separate sheet, if necessary.

Failure to provide sufficient information will result in denial of the request or a delay in review and approval.

Section A. GENERAL INFORMATION

1. What is unique about this product/service to justify a single/sole source?

2. Could the product/service be reasonably modified to allow for competition? Please explain:

3. Explain the market research performed to make the single/sole source recommendation:

4. List the names of suppliers contacted, contact person and a summary of their response:

5. Does requestor have a personal, financial or fiduciary relationship with the recommended supplier? If 'yes', attach complete disclosure: Yes No

Section B. COMPATABILITY OF EQUIPMENT/SERVICES

1. List the manufacture name, make, model number, etc. of the existing equipment with which this purchase must be compatible.

2. What is the remaining life expectancy of the existing equipment?

Section C. TRIAL OR TESTING

1. Why is the trial 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? If "yes", list the company name(s). Will their products be tested?

4. What criteria were used to choose this supplier?

5. What are the scope/size, duration and location of the test or trial?

Requestor Comments or Instructions:

Requested by:

Name (please print)

Date

Signature

Title

Department Director/School Principal Approval:

Name (Please print)

Date

Signature

Purchasing Department Review:

Approved

Conditional Approval

Denied

Single source

Sole source

Comments/Rationale for Denial/Instructions:

Reviewed by:

Name (please print) (PURCHASING DEPARTMENT)

Date

Signature

Title

Approval Expiration Date

UINTAH SCHOOL DISTRICT
Purchasing Department

SINGLE/SOLE SOURCE REQUEST

R33-3-401 Conditions for Use of Sole Source Procurement.

Sole Source procurement shall be used only if a requirement is reasonably available from one supplier. A requirement for a particular proprietary item does not justify a sole source purchase if there is more than one potential bidder or offeror for that item. Examples of circumstances which could necessitate a sole source purchase 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) Purchase of items for resale;
- 4) Purchase 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.

R33-3-402 Negotiation in Sole Source Procurement.

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

Conditions for Use of Single Source Procurement.

A requirement for a particular proprietary item does not justify a single source purchase if there is more than one potential bidder or offeror. Single source purchases may be used when circumstances necessitate that the interests of the District outweigh the requirement of competition. Examples of circumstances which could necessitate a single source are:

- 1) Specialized services or skills not available from direct competitors;
- 2) Goods or services obtained from political subdivisions of the state;
- 3) Prior knowledge and direct technical experience with a system or product, over time, that would not otherwise be feasible or cost effective for another to become involved;
- 4) Matters pertaining to the protection of warranties and guarantees of merchantability for the intended use.

The determination as to whether a procurement shall be made as a single 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.