

# GSU PURCHASING

## SOLE SOURCE / SOLE BRAND JUSTIFICATION

Requisition # \_\_\_\_\_ or attached paper requisition form # \_\_\_\_\_

FROM: \_\_\_\_\_ DATE: \_\_\_\_\_

This is for a \_\_\_ Sole Brand / \_\_\_ Sole Source Purchase (check one). (See page 3 for further instructions.)

1. Proposed Source: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone / Fax: \_\_\_\_\_ / \_\_\_\_\_  
Contact: \_\_\_\_\_

2. Scope of Work: (Describe items/services to be provided.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If the requested item is an integral part of, or an accessory for, or needed to maintain or repair existing equipment, please provide the following information on the existing equipment:

Manufacturer: \_\_\_\_\_  
Model Number: \_\_\_\_\_  
Serial Number: \_\_\_\_\_  
GSU Decal: \_\_\_\_\_  
Dollar Value: \_\_\_\_\_

3. Exclusive Capability: (Describe proposed source's unique capabilities and/or personnel to perform this work and why this is the only source available.) If your request is not for 'Sole Source', skip this section.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_ See attached \_\_\_\_\_ pages of additional information.

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4. Sole Brand Justification:

Applicable Sole Brand Justification: (mark as appropriate)

The requested item is integral to the existing equipment listed above in #2, and is available only as an OEM or OEM dealer part, accessory or repair/service.

Use of non-OEM or non-OEM dealer part, accessory or repair/service voids warranty.

Compatible items to be added to existing system: (describe)

To be used in continuing experiments - continuity of research: (describe)

Matching with existing units of same make/model: (describe)

One of a kind equipment / custom manufacture: (describe)

Prepared A/V materials: (describe)

Advertisement: (describe)

Other Sole Brand Justification attached \_\_\_\_\_ pages.

5.  Vendor quote(s) attached.

6.  Other additional materials / statements attached.

**NOTE: a bid will be issued to confirm the price and purchase terms with the vendor**

Originator / Requestor

Signature

Printed Name

Approved by

Department Head

On Date

Approved /  Not Approved as a

Sole Source /  Sole Brand Purchase by

Agency Procurement Officer

On Date: \_\_\_\_\_

Reason request is "Not Approved":

\_\_\_\_\_  
\_\_\_\_\_

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### Instructions for Sole Source / Sole Brand Form

- Definitions:**
- Sole Brand** indicates that only one unique item or service can meet the requirements of a department. The item or service may be available from more than one source. Note: Personal preference alone is not a valid reason for Sole Brand. Note: The use of a vendor prepared Sole Brand justification or specification comparison sheet alone is generally not acceptable.
- Sole Source** indicates that only one source can supply for an item or service that has already been determined to a Sole Brand purchase. Note: Personal preference alone is not a valid reason for Sole Source. Note: The use of a vendor prepared Sole Source justification alone is generally not acceptable.
- Proposed Source:** Provide the name, address and phone number of the supplier. If Sole Brand, include the information (and quotes if available) from each dealer contacted.
- Scope of Work:** Provide information to establish the context of the Sole Source / Sole Brand, e.g. item's or service's function. Where and how the item and service is to be used, operational environment, previous experience or history, etc. Use layman's terms to identify any efforts made to locate other possible sources that could provide the item or service. Indicate the use of Thomas Register, industry organizations, Internet searches, consultants, industry publications, contact with Buyer, etc.
- Exclusive Capability:** Describe the proposed supplier's unique capabilities and explain why this is the only source available. Provide specifics. Examples in which Sole Source could be acceptable are:
- Only one supplier can satisfy the technical requirements because of unique technical competence or expertise. (Technical requirements must be valid and verifiable).
  - Only one source possesses patents or exclusive rights to furnish the item/service. (For example, the product is only available from the manufacturer, software developer, etc.) Or only one supplier has the ability to furnish the item or service.
- Sole Brand:** Indicate why the requirement can only be satisfied by this specific item or service. Be specific and provide details of other items / services investigated and rejected as not being able to satisfy the requirement.

Once your request has been approved, it will be bid if the estimated cost is over \$2,500, and may be posted to the State's Bid Opportunity list maintained at the DOAS web site. If the estimated cost is \$10,000 or above, the bid will be posted. If the estimated cost is \$100,000 or greater, it may be forwarded to State Purchasing for processing.

The bid process is method used to verify and validate the pricing and sole source / sole brand designation as well as establish with the award vendor the terms and conditions under which we will purchase the item or service.

The bid will be listed as 'no substitution', but vendors may choose to respond with an alternate. You are encouraged to be as complete as possible in requesting Sole Source / Sole Brand status. In the event that a substitution is offered, it is often very difficult to prove the alternate unacceptable with specifications and specific needs mentioned 'after the fact' of the bid closing.