

Sole Source/Preferred Vendor Justification Form

Policy Reference:

Competitive Bidding

A minimum of three bids must be solicited for goods and services purchased in the amount of \$25,000 or more. For purchases requiring bids, the requesting department is responsible for developing and compiling the proper documentation, including a clear and accurate description of the technical requirements for all products or services to be procured, and requesting bids from the specified vendors. The Purchasing Department is available to assist with this process if needed. Once vendors have been notified of the bid request, the vendors are provided a deadline to submit their bids. Each bid or quotation is deemed completed and considered in the bid process when the bid has included a description of all products or services available to address the request, the costs of the products or services to be provided, any additional related costs (e.g., handling fees, delivery, installation cost), and the payment terms. If bid information is incomplete, the Purchasing Department will follow up with the vendor to get additional information. The Director of Procurement and Other Support Services is responsible for reviewing all bids against the purchase requisitions and will select the vendor to use after considering pricing and other criteria such as the vendor being able to provide goods or services timely. Additional justification will be included with the purchase requisition if the lowest bid is not selected.

Sole Source

A sole sourced procurement is an acquisition of goods or services which restricts the University to a single vendor or brand. The department must provide written justification that the vendor is sole sourced, and therefore exempt from the bidding requirement. Justification letters should not be provided by the vendors whose equipment or services are being considered. Departments cannot treat a vendor as sole sourced simply because they prefer a specific vendor or brand if there are other viable options.

Preferred Vendors

Preferred vendors have been identified by the University's Purchasing Department as providing fair and economical pricing on the goods or services that they provide; therefore, the University has decided to frequently utilize these vendors for purchasing needs. Goods or services purchased from a preferred vendor do not have to go through the bid process. A preferred vendors listing is maintained by the Purchasing Department which is available upon request. Departments can submit justification to assign a vendor as preferred; however, the Director of Procurement and Other Support Services has ultimate discretion over the classification. All preferred vendors are formally reviewed annually by the Purchasing Department to assess whether they continue to provide the University with pricing that is within range or better than competitors. A sample of regularly purchased items is selected and the pricing from the preferred vendor is compared to the pricing of a few competitors to determine whether the preferred vendor is providing comparable pricing. Documentation of the annual pricing review is retained to justify the vendors being included on the preferred vendor listing.

JUSTIFICATION

The Sole Source-Preferred Vendor Justification Form must be submitted as justification for purchase from a Sole Source or Preferred vendor when making purchase(s) of item/system. This justification should be used as an exception and is not meant to be used to circumvent policy and procedures. Acceptance of this justification is at the discretion of the Purchasing Office. Please complete the Sole Source-Preferred Vendor Justification Form for review prior to submitting a purchase requisition.

All procurement activities will be conducted in a manner that ensures fair competition, cost-effectiveness, and integrity. Sole-source procurement will only be utilized under documented and approved exceptional circumstances, with justification aligning with federal and state requirements. Prior to any purchase, the Grants Accounting Office and the Procurement Office must review and approve the procurement request to ensure compliance with funding requirements, proper documentation, and adherence to competitive purchasing standards, internal controls, approval processes, and documentation standards.

Sole Source/Preferred Vendor Justification Form

Name: _____

Requesting Dept.: _____

Request Type: (Check one) _____ Sole Source _____ Preferred Vendor

Selected Vendor Name: _____

Selected Vendor Phone #: _____

Description of item/service: _____

Description of function and business purpose: _____

Has a Price/Cost Analysis been performed: _____ Yes _____ No
If yes, please include a copy.

Dean/Supervisor Name: _____

Dean/Supervisor Signature: _____ Date: _____

Choose the appropriate reason for Sole Source/Preferred Vendor and provide details that justify selection.

1. Only one supplier can be identified to supply product.

2. Compatibility with existing equipment.

3. Public Emergency Procurement.

APPROVED BY DIRECTOR OF PROCUREMENT

Signature: _____ Date: _____

Form created by: Procurement Office
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