

City of Orlando
Purchasing and Material Management
Sole Source Process

Purpose

Commodities or contractual services shall be procured through the competitive solicitation process in accordance with Chapter 7, City Code. A Department/Office may request that a product or service be considered as a sole source purchase without competition, with appropriate justification and documentation and when the Director of Purchasing and Materials Management or designee determines, based on the facts, that there is only one source for the required product or service.

Process

A Department/Office may request that a product or service be considered a sole source after performing research and documenting the findings on a Sole Source Form. It is the responsibility of the Department/Office to ensure that a thorough investigation is performed. The form must be completed and signed by the Department/Office Director certifying the validity of the sole source findings.

The completed form shall be forwarded to the Office of Purchasing and Materials Management for processing at least 60 days prior to the actual need to ensure adequate processing time, for review, negotiation, or solicitation as required.

Sole Source Form

The Sole Source form is used to document the facts and related research data to support the request. The Department / Office requesting the sole source purchase is responsible for completing the Form. The Single Source Request Form shall contain the following information.

1. Date of request;
2. Name of end user and phone number;
3. Requesting Department/office;
4. Product or service requested;
5. Description of the product or service and its function;
6. Requested vendor/contractor name;
7. Amount of the product or service;
8. Initial legitimacy of single source purchase;
9. Describe in detail how this is the only source for the required product or service and describe the efforts that were made to verify and confirm that this is the only source for the product or service;
10. The end user is responsible for including documentation provided by the vendor or other sources to certify that the vendor is the only source for the product in question and holds the production, copyrights, trademark and/or patent to the item; and
 - a. The vendor holds the exclusive distribution rights for the product in question;
 - b. The product being purchased is the only item compatible with existing City owned equipment;
 - c. The vendor is the sole provider of the goods or services that has unique characteristics essential to the needs of the program to perform the intended function which no other product will work for the City.

11. Please state the necessary features this vendor provides which are not available from other vendors;
12. Please state what steps were taken to verify that these features are not available elsewhere;
13. End user's signature and date;
14. Supervisor's signature and date.

Upon completion of the Sole Source Request Form, obtain Manager or Director sign-off and forward the request to the Office of Purchasing and Materials Management for review and validation. **This form does not declare a Sole Source. It only documents a request to declare the procurement as a Sole Source.**

Purchasing and Materials Management Responsibilities

1. As part of the review and validation process, Purchasing and Materials Management staff (reviewer) will prepare a plan of action to survey, explore or make inquiries about the product or service requested.
2. Notice of Intent to Sole Source is posted on the Purchasing and Materials Management Website for seven (7) calendar days.
3. If City Council approval is required, Purchasing staff will work with the Department/Office to develop an agenda item for City Council approval of the sole source purchase.
4. If an alternate resource is offered by a supplier of the product or service, the Purchasing Staff Reviewer shall notify the Department/Office of the need for the preparation of a competitive solicitation.
5. The Department/Office requesting the sole source will be notified of the approval status/action taken by the Director of Procurement Services, or if applicable, by the City Council.

Division /Department/ Office Responsibilities

1. Department / Office is responsible for the initial research and submittal of justification date/information in support of the request using the Sole Source Form.
2. Upon approval of the Request for Single Source, the Department / Office shall enter a requisition into the JD Edward Procurement System for processing into a Purchase Order.