

UNIVERSITY OF MASSACHUSETTS BOSTON

Justification for Sole Source and Sole Acceptable Source/Brand

Commodity Purchase over \$5,000 not covered under Contract

This form shall be used to justify Sole Source and Sole Acceptable Source/Brand for all types of purchases except Consultant/Professional Services and Operational Services, which have their own unique form.

In accordance with University policy, which has been mandated by the State and Federal auditors, any sole source or sole acceptable source/brand product, in excess of \$5,000, that is not covered by State or MHEC Contract, must be accompanied by an original written quotation from the vendor and a written explanation/justification from the requester.

Sole Source means that the product is unique and that the vendor is the only one in the world from whom the product can be purchased. Justifications for Sole Source shall include the following:

(1) a statement to the effect that the requester has thoroughly researched the purchase, and to the best of the requester's knowledge and belief, the vendor for the product is the only one in the world from whom the product can be purchased; (2) a detailed explanation of what the product is, its purpose, and what it is about the product that makes it unique. If unique technical features or accuracy are the basis for sole source, the justification must so include.

Sole Acceptable Source/Brand means that similar types of products may exist, but that the vendor/brand, for reasons of expertise, and/or standardization, quality, compatibility with existing equipment, specifications, or availability, is the only source/brand that is acceptable to the requester or the University. Sole brand may be available from more than one source of supply, and, if so, shall be competitively bid to those sources in accordance with the purchasing policy established by the University for the particular type of procurement. Justifications for Sole Acceptable Source/Brand shall include the following:

(1) a statement to the effect that the requester has thoroughly researched the purchase and that the vendor/brand is the only acceptable vendor/brand to fit the particular need; (2) a detailed explanation of the particular need; (3) a list of the other vendors/brands considered; (4) why the vendor/brand was selected over other vendors/brands, including a detailed comparison of features, if applicable; (5) what the requester has done by way of cost comparison to determine that the charge is not out of line with the current market pricing for the product.

Note that "best price" alone cannot be used as a basis for sole source or sole acceptable source/brand. If the product is available from more than one source of supply, best price must be determined through the competitive bid process.

Please sign your explanation/justification. Attach all other written documentation, as appropriate, and submit to the Procurement Department with purchase request number.

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Name of Vendor: _____

Purchase Request No.: _____ **Date:** _____

Total Amount: \$ _____

Purchase is (check one or more, as may be applicable):

Sole Source _____ Sole Acceptable Source _____ Sole Acceptable Brand _____

Detailed Explanation/Justification (All applicable points as described above must be covered.)

I certify under the penalties of perjury that the above statements are true and precise and that I have no financial or other beneficial interest in the vendor.

Account Administrator _____

Date _____

Immediate Supervisor _____

Date _____

Assistant Vice Chancellor for Contracts and Compliance _____

_____ Date