

SOLE SOURCE / BRAND JUSTIFICATION

Use this form whenever a specific brand product is required and no other alternative brand is acceptable or when a specific vendor is required and no other vendor is available and/or acceptable. Submit completed form, as part of your backup documentation, with signed Purchase Requisition.

SOLE SOURCE (Item or service only available from one vendor/source)

SOLE BRAND (Bids to be solicited for specified brand only)

Requested Vendor or Brand:

Dollar Amount:

Requested Item/Service (Briefly describe product or service and give a brief explanation as to the function of this item or service. Attach a memo to this form if necessary to better explain.):

1. What are the unique performance features of the product or brand requested that are not available in any other product or brand? (For services: What are the unique qualifications this vendor possesses?) Identify specific, measurable factors/qualifications.
2. Why are the unique features/qualifications required?
3. What other brands/services were evaluated, rejected and why? Provide brand name, model, vendor name and contact, date contacted and prices quoted. A minimum of three suppliers must be surveyed and the results noted below.
4. To match or "intermember" is not normally an acceptable justification for sole brand. If you determine this is a factor which should be considered, the quantity, manufacturer, brand, model, State property ID number of the existing equipment, and necessity for "interfacing" must be provided below.

CERTIFICATION: *I am aware of the CSU and State of California requirements for competitive bidding and the established criteria for justification for sole source/sole brand purchasing. As an approved department representative, I have gathered the required technical information and have made a concerted effort to review comparable/equal equipment. This effort is documented in this justification. I hereby certify as to the validity of the information and feel confident that this justification for sole source/sole brand procurement meets the State's criteria and withstand an audit by the State Board of Control or a vendor protest.*

The following procedures have been followed to justify this purchase:

1. Unique performance factors have been specified.
2. Statement as to why they were required.
3. Other products have been evaluated, and reasons for rejection stated.

Note: Sole source or Sole Brand requests shall not be justified on the basis of:

- A lack of advance planning;
- Personal preference for product or vendor;
- Concerns related to the amount of funds available for the acquisition of the goods or services;
- A previously non-competitively bid contract for which the price to the CSU was zero or substantially below fair market price and the results of such contract caused the sole source or sole brand to be required on future contracts.

Please complete #1 and #2 below and forward to Procurement with your Purchase Requisition.

1. REQUESTOR:

DEPARTMENT

Signature: _____

Date

2. _____
(Division Executive or Designee)

Date

3. _____
AVP/Chief Procurement Officer or Designee

Date

4. _____
Vice President and CFO
(Required on purchases from \$100,000 to \$250,000)

Date

5. _____
Contracts Services and Procurement - Office of the Chancellor
(Required on purchases over \$250,000)

Date