



The City of Edgewater

Finance Department
104 Riverside Drive
Edgewater, FL 32132

PURCHASING JUSTIFICATION FORM

TO: Finance Department	FROM: _____
Subject - Purchase of: _____	
Requested Supplier – Contact: _____ Company: _____ Address: _____	City, State, Zip: _____ Phone: _____ Estimated Cost: \$_____
Statement of Need: My recommendation for use of a Sole/Standardized/Proprietary Sourcing, Piggy-Back or Cooperative Contract is based upon an objective review of the product/service being required and appears to be in the best interest of the City. I know of no conflict of interest on my part or involved in any way with this request. No gratuities, favors or compromising actions have taken place. Neither has my personal familiarity with particular brands, types of equipment, materials or firms been a deciding influence on my request justification for this purchase when there are other known suppliers to exist.	
<p style="text-align: center;">Justification: Mark those that apply.</p> <p><input type="checkbox"/> 1. Sole source request is for the original manufacturer or provider; there are no regional distributors. (Attach the manufacturer's written certification that no regional distributors exist. Item 4 must also be checked).</p> <p><input type="checkbox"/> 2. Sole source request is for the only area distributor of the original manufacturer or provider. (Attach the manufacturers -not the distributors - written certification that identifies all regional distributors. Item 4 also must be checked).</p> <p><input type="checkbox"/> 3. The parts/equipment are not interchangeable with similar parts of another manufacturer. (Explain in separate memorandum and attach).</p> <p><input type="checkbox"/> 4. This is the only known item or service that will meet the specialized needs of this department or perform the intended function. (Attach memorandum with details of specialized function or application).</p> <p><input type="checkbox"/> 5. The parts/equipment are required from this source to permit standardization. (Attach memorandum describing the basis for the standardization request).</p> <p><input type="checkbox"/> 6. A competitively bid contract is available to piggy-back, that is in the best interest of, meets the needs of and follows the City's terms and conditions is available. (attach originating contract)</p> <p>Originating Entity:_____ Contract/Bid # _____</p> <p><input type="checkbox"/> 7. A competitively bid cooperative contract is available, that is in the best interest of, meets the needs of and follows the City's terms and conditions is available. (attach originating contract)</p> <p>Originating Entity:_____ Contract/Bid # _____</p> <p><input type="checkbox"/> 8. None of the above applies. A detailed explanation and justification for this sole source request is contained in the attached memorandum.</p> <p>I attest that this requests meets the standards and intent</p> <p>Division Head Signature: _____ Date: _____</p> <p>Department Director Signature: _____ Date: _____</p> <p>Comments: _____</p> <p>Finance Approval:_____ Date: _____</p> <p>City Manager Approval: _____ Date: _____</p>	

PURCHASING POLICY - SECTION XV

PURCHASES NOT REQUIRING BIDS

PURPOSE: This section defines the limitations of purchasing without solicitation. Authorization for purchase of these items will follow the threshold approval authority as outlined in this Policy.

SOLE SOURCE AND PROPRIETY SOURCE: The following criteria must be met in order to satisfy the sole source or proprietary source requirement:

- a. It is the only item that will produce the desired results (or fulfill the specific need) ...or
- b. The item is available from only one source of supply ... or
- c. The item is available from more than one vendor but due to extreme circumstances, only one vendor is suited to provide the goods or services.

Sole source and proprietary source purchases are exempt from competitive requirements. However, all sole source Requisitions exceeding \$10,000 in value will be electronically advertised for a period of at least 5 business days. The steps to follow for sole source and proprietary source purchases are as follows:

- a. The User Department/Division and the Finance Department shall attempt to locate competition. Staff will also check for piggyback contracts. If no other sources are found, the User Department/Division shall submit to the Finance Department a completed sole source/proprietary source form, indicating the requisition number.
- b. A sole source or proprietary source form shall be used to justify and document the requirement. The form shall state why only one source can produce the desired results (or fulfill the specific need).
- c. The Finance Director shall review and approve or disapprove, in writing; sole source/proprietary source designation.
- d. The User Department/Division shall be notified of disapproved requests and the purchase shall be made in accordance with standard procedures.
- e. When the Finance Director approves a sole or proprietary source, staff shall conduct negotiations on price, delivery, and terms. The price must be determined fair and reasonable.
- f. The Finance Department shall keep a log of sole/proprietary source purchases, which includes the vendor name, the amount, item description, justification, and the purchase order number.
- g. For those instances that services are needed involving multiple years (i.e. maintenance of equipment, warranty, etc.) the request must be combined to capture the project, as a whole, and the proper approval must be obtained.

STANDARDIZATION

DEFINITION: Standardization is the process of examining characteristics and needs for items of similar end usage and developing a single specification that will satisfy the need for most or all purchases for that purpose. Proprietary purchases (usually components) maintain a degree of continuity to the original or existing decor, equipment, or programs.

Where standardization is determined to be desirable by the Finance Director, the purchase of materials, supplies and equipment and certain contractual services may be made by negotiation.

Compatibility to existing equipment will be an acceptable justification for waiver of bidding procedures provided the item meets the other criteria within the definition of sole source item (i.e.; available from only one source and only item that will produce the desired results).

COOPERATIVE PURCHASING

DEFINITION: An approach in which several organizations jointly buy selected items. They may form or utilize a centralized buying service that purchases specified types of items for all members of the group or cooperate informally. The resulting volume buying usually produces significant cost savings for group members.

The Finance Director shall have the authority to join with other units of government in cooperative purchasing ventures when the best interests of the City would be served and the same is in accordance with City Ordinances. Purchases in any amount may be made against established G.S.A, State of Florida, or other units of government and non-profit organizations including established and approved Cooperative Purchasing Associations (i.e., OMNIA Partners, The Cooperative Purchasing Network -TCPN, National Joint Powers Alliance - NJPA, The Interlocal Purchasing System

- TIPS USA, BuyBoard etc.) term contracts without bidding, provided they are in the best interest of the City.

Purchases from the current City cooperative contracts, state term purchasing contracts, or state university system cooperative bid agreements, non-profit organizations, and approved Cooperative Purchasing Associations will be an acceptable alternative procedure for bidding, providing all terms and conditions of the contract apply.