



**University of Massachusetts Dartmouth
Documentation Form
Sole Source, Sole Acceptable Brand**

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This form shall be used to justify Sole Source and Sole Acceptable Brand for all types of purchases except Contracting for Professional Services, which has its own unique Documentation 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/service, in excess of \$2,000, that is not covered by State, University, * 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/service is unique and that the vendor is the only one in the world from whom the product/service 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/service is the only one in the world from whom the product/service can be purchased; (2) a detailed explanation of what the product/service is, its purpose, and what it is about the product/service 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/services 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/service.

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

Please write and sign your explanation/justification on the reverse side of this form, attach all other written documentation, as appropriate, and submit to the Purchasing Department with the purchase requisition.

*Same dollar restrictions may apply if against a University Contract.

