

COLORADO SPRINGS SCHOOL DISTRICT 11

**JUSTIFICATION AND APPROVAL OF SOLE SOURCE
OR NON-COMPETED PURCHASE/CONTRACT**

Contracting Officer's Technical Representative (COTR) Worksheet – to help document creation

In accordance with District Acquisition Regulation Sections 4.106 and 9.1

Applicable to: Professional Services at \$50,000 or above
Supplies, Services, Equipment, Hardware, Software, Software Licensing, Installation, Maintenance
at \$25,000 or above
PCard purchases at \$5,000 or above
Construction at \$50,000 or above

Date:

Company Name:

Product/Service Description:

Initial Product/Service Value: \$

Total Effort Costs: \$

Delivery Due Date:

OR Period of Performance:

(NOTE: First period of performance may be a partial year ending with fiscal year on June 30th.)

***If Multi-year** effort, describe future year activities here or refer to an **attachment**.

Customer and Contracting will **annually** verify both the pricing reasonableness and source availability.

Number of Students and/or Staff Impacted:

Location(s):

Funding Source over the Life of Service: ____-____-____-____-____-____ (account chart string)

Fund Source Description: _____ (e.g., grant, maintenance, training, etc.)

JUSTIFICATION

Desired Outcome:

Examples: Re-engaging students; Improving student performance; Improving educational environments; System compatibility; Product life expectancy; Standardization (consider staff training (previous and future); Upgrading technology; Increasing staff training/professional development opportunities; Enhancing building safety; Aesthetic appeal or match, etc.

Need/Why?

Examples: This service/product is needed on an exclusive or **emergency**/urgent basis. **OR** Competition will delay needed response timing. **OR** This service/product is determined to be a specific fit to resolve the “x” **OR** the best option to match the quality, quantity, or service level desired.

Basis: Staff is selecting this company and product/service based on following unique and essential qualities:

Examples: Company qualifications – past performance. Unique characteristics (licenses, certifications); Showing of published results or national recognition; Higher (differentiated) quality level (this is more specific to a product purchase than a service procurement); market research;

OR Company was **referred to us by another entity (state entity name, below)**

Examples: CDE or higher authority (e.g., Superintendent, County or State Health Department, Social Services) recommendation ... still must JUSTIFY for D11 use.

OR Company was pre-qualified or has exclusive distributorship or franchise in Pikes Peak Region.

OR Local response needed (due to timeliness, item fragility, etc.). Include market research demonstrating the response.

OR Volume discounts, validated by recent (within 12 months) competition; Item not readily available, few or no competition options (**OR** competitor “x” has this gap); Standardization – item use is supported by prior and on-going training of district personnel; Response – company can provide [insert item or service] quickly.

Market Research: COTR has determined that this is their best product/service option based on:

Examples: Professional experience; professional organization/colleague reviews; current industry or market trends

Pricing: D11 COTR has done price comparison research by the following method(s):

Examples: State contract; cooperative agreement pricing; other governmental entities’ pricing; published price list (like “GSA”); vendor fair/convention discussions; professional organization peer pricing.

References: D11 staff contacted other districts or governmental entities that use this company’s product/service and found that the company is reputable and reliable. Recent and relevant product/service usage (within 5 years) received favorable reports from:

1. District/Governmental Entity and Contact Name:

2. District/Governmental Entity and Contact Name:

3. Private Company Reference with Contact Name:

4. Professional Organization Reference with Contact Name:

Impact: *If* this purchase is delayed or denied, it will have the following impact:

APPROVALS

Contracting Officer’s Technical Representative (Project Manager)

Signed: _____

Name: _____

Title: _____

Date: _____

Budgetary Approver

Signed: _____

Name: _____

Title: _____

Date: _____