

CHAPTER 8

SOLE SOURCE AND EMERGENCY PURCHASES

8-1 PRE-PLANNING

- A. Always invest a sufficient amount of time in planning and preparing your Sole Source Justification Form (PBSD 1625) for the items or services needed.
- B. The formal Sole Source process from the time of receipt of Sole Source Justification Form to final approval may take a maximum of 30-45 days. Administrative lead time for purchasing includes preparation of the intent to purchase from sole source documents.
- C. Purchases over \$250,000 per vendor per fiscal year require advance approval by the School Board.

8-2 SOLE SOURCE PROCEDURES

- A. General: The School Board Policy 6.14 authorizes waiving the competitive bid process when a written justification has been made by the responsible Administrator, Purchasing Agent, General Manager, and Director that there is only one source available to supply a good or service.
- B. Criteria. The following are the criteria used for determining sole source:
 - 1. Item, rather than its function, is the subject for instruction.
 - 2. Item(s) is (are) only acceptable replacement part(s) known.
 - 3. Item(s) must be physically or chemically compatible with existing item.
 - 4. Only item(s) approved by authorized evaluation for use intended.
 - 5. Item(s) must be identical to an existing item(s).
 - 6. Process or material storage compatibility.
 - 7. Parts and attachments interchangeability.
 - 8. Material and job interchangeability.
 - 9. Continuity of design.
 - 10. Other - Requires detail explanation.
- C. Procedures. (See Sole Source Justification Form on page 8-3) The following procedures shall be used:
 - 1. Complete the Sole Source Justification form PBSD # 1625.
 - 2. Forward completed form to appropriate Principal/Department Head for signature and approval.
 - 3. Forward completed form to the Purchasing Agent.

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4. The Purchasing Agent will receive the request and issue a public notice of the intent to purchase from a sole source by posting the intent on www.bidsync.com.
5. A public opening will be held at the date and time advertised and announcement of all responses will be received.
6. Evaluation of responses based upon the intent to purchase from a sole source.
7. General Manager of Purchasing will review and approve/disapprove.
8. Director of Purchasing will review and approve/disapprove. At this point a determination will be made by the Director of Purchasing whether an agenda item will be prepared for the School Board.

8-3 EMERGENCY PURCHASE PROCEDURES

- A. General: School Board Policy 6.14 authorizes the Superintendent to approve a waiver of competitive processes when the items needed are necessary to maintain a safe operational environment, the loss of which would create a situation which would adversely and unduly affect the safety, health or comfort of building, occupants or otherwise cause loss to the School Board.
- B. Criteria. The following is the criteria for determining whether to use Emergency Purchase Procedures:
 1. An equipment breakdown or act of God threatens to terminate essential services; or
 2. Public safety, health or welfare are threatened by a dangerous condition or immediate need for supplies, equipment or services.
- C. Procedures. The following are procedures to be followed for emergency situations:
 1. During normal District business hours, the Principal/Department Head shall notify the Purchasing Agent of the emergency situation and shall provide the Purchasing Agent with the following:
 - a. The nature of the emergency;
 - b. The estimated cost of the service/goods required;
 - c. The vendor recommended to receive the order; and
 - d. A requisition entered and approved in PeopleSoft.

This written justification of the purchase shall be signed by the initiating Administrator and his/her Regional Superintendent, Director / Assistant Superintendent, Chief Officer and Superintendent. The Purchasing Department will then have it approved by the Superintendent or designee and process the purchase order.

2. If a purchase must be made during other than normal District business hours, the initiating Administrator shall call the Director of Purchasing or designee or the Superintendent or designee and request approval to proceed with the emergency purchase. The above mentioned paperwork shall follow the approval of any such emergency purchase prior to the close of the next business day in the District.
3. The initiating Administrator shall take special care in ensuring the emergency service is completed promptly and accurately. Any problems should be reported to the Purchasing Agent promptly.

SOLE SOURCE JUSTIFICATION FORM

PBSD Form #1625



THE SCHOOL DISTRICT OF PALM BEACH COUNTY
PURCHASING DEPARTMENT
**Request for Approval of "No Substitute"
Sole Source Purchase Specification**

TYPE UNLESS OTHERWISE INDICATED

FROM: NAME	FROM: NAME SIGNATURE/DATE		
TITLE	SCHOOL OR DEPARTMENT		
REQUIRED - RECOMMENDED PRINCIPAL/DEPARTMENT HEAD SIGNATURE/ DATE	REQ. NO.	PURCHASING AGENT	DATE
ITEMS			

We request approval of a "NO SUBSTITUTE" sole source specification for the purchase of the subject item(s) for the reason indicated below: (Check appropriate justification(s). Explanation(s) shall be entered in the space provided on the reverse side of this document.)

- 1. Item, rather than its function, is the subject for instruction. (explain)
- 2. Item(s) is (are) only acceptable replacement part(s) known for (identify).
- 3. Item(s) must be physically or chemically compatible with (Identify with existing item and explain).
- 4. Only item(s) approved by authorized evaluation for use intended. (explain)
- 5. Item(s) must be identical to an existing item(s) because of (explain)
- 6. Process or material storage compatibility: (explain)
- 7. Parts and attachments interchangeability: (explain)
- 8. Material and job interchangeability: (explain)
- 9. Continuity of design: (explain)
- 10. Other: (explain)

Explanations shall be in detail and contain sufficient information and justification for the items to be considered and approved as "NO SUBSTITUTE" sole source items. Failure to do so will result in the request being denied and returned to the originator.

DETAILED EXPLANATION FOR REQUESTING THIS "NO SUBSTITUTE" ITEM(S)

RECOMMENDED APPROVAL

PURCHASING AGENT	APPROVAL	COMMENT
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
MANAGER	APPROVAL	COMMENT
	<input type="checkbox"/> YES <input type="checkbox"/> NO	
DIRECTOR	APPROVAL	COMMENT
	<input type="checkbox"/> YES <input type="checkbox"/> NO	