



SOLE SOURCE REQUIREMENTS

Business Services
Mat-Su Borough School District
501 N. Gulkana
Palmer, AK 99645
P: 907.761.4001 || F: 907.761.4091

Instructions: The following information is required to justify a sole source purchase in the Mat-Su Borough School District. Justification should be noted on the Federal Funds Procurement by Non-Competitive Proposals Request (also known as EDGAR Noncompetitive Proposal Request, PUR10) form or Exemption from Formal Bidding Requirements Request (BUSSVS15) form in the appropriate text box. Justification can also be provided on a separate letter or memo and attached. MSBSD Average Daily Rate (use when calculating training costs): Certified Staff \$538.60/day, Classified Instructional Support Staff \$334.50/day.

Required Documentation:

Written explanation from District employee who is a subject matter expert(s) clearly describing:

1. Their name, title, program experience, and why he/she is qualified to speak authoritatively on the matter.
2. Why the product or service is needed.
3. Why the product or service is the only one that will work for the program or why the selected vendor's unique skills and/or knowledge is the best for the program.
4. Quantified potential time and/or cost impacts if the product/service were not purchased or a different vendor were selected. Include one (1) or more of the following:
 - a. Costs to transition to another product that outweigh any potential savings.
 - b. Investments in the current product (i.e., training, specialized equipment, data/research already performed, etc.) that would be lost.
 - c. Voiding existing equipment warranties or maintenance agreements.
 - d. Needing X number of hours to reach the same level of expertise as the selected vendor, costing Y amount more.

Other Supporting Documentation:

- Written explanation from the vendor clearly describing:
 - That they are the only source of the product or service and that they do not offer their product or service through dealers or resellers or, if they do, that the pricing through a dealer or reseller would be the same or higher; or
 - Their unique skill or knowledge and how they came to possess it (as presented via resume, CV, references, sample work, etc.)
- Any documentation and/or records that support an existing District standard, or requirement that only this vendor can fulfill.
- Documented research that demonstrates why it's not practical to compete the services. Web search results are often used to support this.
- Written testimony from other vendors or third parties describing their inability to provide the same unique skill or knowledge and/or supporting the requested vendor.

EXAMPLE JUSTIFICATIONS FOR SOLE SOURCE PROCUREMENT

Example Justification for Software (using cost impact [4.b])

[1] A memo from Jane Doe, Ed. D., Associate Superintendent of Instruction

[2] The District currently uses the MathCounts! software to support and enhance elementary-level students' math skills. **[3]** MathCounts! is a nationally-recognized program that engages students through unique math games and motivates skill-building through earning in-program progress badges. It is a specialized program that reinforces District math standards for grades K-5. **[4.b]** This software has been in use by the district for over 10 years. The continued use of this software allows teachers and support staff to accurately monitor an individual student's math skills progress year over year. As the software is proprietary, the data regarding individual student benchmarking, skills acquisition, and progress is not transferrable to nor replicable in a different program. The historical, longitudinal data that has been compiled for individual students has significant intrinsic value that cannot be quantified.

Example Justification for Software (using cost impact [4.d])

[1] A memo from Jane Doe, Ed. D., Associate Superintendent of Instruction

[2] The District currently uses the MathCounts! software to support and enhance elementary-level students' math skills. **[3]** MathCounts! is a nationally-recognized program that engages students through unique math games and motivates skill-building through earning in-program progress badges. It is a specialized program that reinforces District math standards for grades K-5. **[4.d]** In addition to the cost to implement and license a new program, it is estimated that the District would incur an additional 1,600 hours of training time for elementary teachers and support staff, costing approximately \$120,000. The District would also have to spend an estimated 15,000 hours of instructional time on students retesting and recreating benchmarking data that already exists in the current program.

Example Justification for Software (using cost impact [4.a])

[1] A memo from Jane Doe, Ed. D., Associate Superintendent of Instruction

[2] The District currently uses the MathCounts! software to support and enhance elementary-level students' math skills. Due to staff turnover, we have new teachers and support staff who need to be trained on this software. **[3]** Joe Smith is the only Learning Live Certified Trainer in Alaska. He has been a trainer for MathCounts! software for six years and was a public school teacher for ten years before that. He is uniquely qualified to provide professional development to District teachers and staff on this software. Refer to the attached resume and letter of certification from Learning Live, Inc. **[4.a]** Using a different Learning Live Certified Trainer from out of state would incur an additional \$3,500.00 in travel, lodging, and per-diem costs.

Example Justification for Laptops (using cost impact [4.a])

[1] A memo from Sue Jones, IT Program Manager

[2] To support current virtual learning software, several teacher laptops needed to be refreshed. **[3]** The District has standardized to the Dell Latitude 3310 to promote efficiencies in technical support and to ensure compatibility with other hardware and software used throughout the District. **[4.a]** Switching models or using multiple models of laptops for staff would negate these investments and result in increased support costs to the District to maintain additional types of devices. This includes an increase of 10-15 hours of recurring support maintenance per month for each different model that the District supports, which would cost \$5,400-\$8,100 annually.

Example Justification for Counseling Services (using cost impact [4.a])

[1] A memo from John Johnson, Director of Student Support Services

[2] In order to provide mental health and behavioral health support to Su-Valley High School students, the Department sought out a vendor who could provide on-site counseling services. **[3]** Family First Counseling has been providing services in the Susitna Valley for ten years and is highly respected by peers in the field. They were the only vendor found who could provide in-person services at SVS (see attached emails). Pioneer Psychological Associates could provide the requested services, but only at their office in Wasilla. Alaska Whole Health Services and Mat-Su Counseling provided written responses stating they cannot accommodate the requested services. In addition, Alaska Whole Health Services recommended that we contact Family First Counseling. **[4.a]** Transportation to providers in Wasilla or Palmer would be cost prohibitive, and students would lose out on valuable instructional time. At the federal reimbursement rate for mileage, it is estimated that transportation would cost an additional \$65 per student per session, and be a two-hour round trip.