

Sole-Source/Single-Source Justification

It is unlawful for a public servant, with corrupt intent to obtain a benefit for any person or to cause unlawful harm to another, to circumvent a competitive bidding process required by using a sole-source contract for commodities or service. Florida Statute, Chapter 838.22

Sole Source Definition:

A source selected for the purchase of goods or service over \$3,000.00 when there are no other sources capable of providing the goods of services except for the one selected.

Single Source Definition:

A source selected for the purchase of goods or service over \$3,000.00 due to the compatibility of equipment, replacement parts, training, warranty, or some other unique purpose even though other sources are available.

Sole Source/Single Source purchases of \$50,000 or more require City Commission approval.

General Info	Vendor Info	Goods/Service Info	Authorization
Requesting Dept: CITY CLERK			Requestor's Name: BATRES,JAQUELINE
Today's Date: 10/06/2021			Requestor's Title: ADMINISTRATIVE ASSISTANT
Total Amount: \$30,000.00			IT Related Purchase: <input type="radio"/> Yes <input checked="" type="radio"/> No
Description of Product or Service: The City Clerk uses the services of SML, Inc. to provide a comprehensive records management plan for the City such as detailed scheduling, set disposition, and imaging requirements/options as well as make recommendations.			
Or if based on usage not to exceed approved budgeted funds:			
Fund: 0121-3190	Account:		Project Code:
Initial Contract Term: 01/27/2018	to: 01/26/2019		
Renewal Terms: 01/27/2021	to: 01/26/2022		
	to:		
Vendor Name:	SML, Inc.		
Vendor Contact:	Matt Daugherty, Executive Vice President		
Street Address:	6001 North A1A, Suite 8024		
City:	Vero Beach		
State:	FL		
Zip:	32963-8024		
Email Address:	mattdaugherty@msn.com		
Phone (TYPE #s ONLY NO DASHES):	(813) 528-2705		
Fax (TYPE #s ONLY NO DASHES):			

Please check all statements applicable to the purchase of the particular good/service you are requesting as a sole or single source purchase:

- Sole provider of a licensed or patented good or service.
- Sole provider of items that are compatible with existing equipment, inventory, systems, programs or services.
- Sole provider of goods and services for which the City has established a standard.
- Sole provider of factory-authorized warrant service.
- Sole provider of software maintenance/annual fees on existing software or web-based subscription
- Sole provider of goods or services that will meet the specialized needs of the City or perform the intended function (attach documentation).
- None of the above apply. A detailed explanation and justification for this sole source request is attached.

Product/Service Specifications:

The City Clerk uses the services of SML, Inc. to provide a comprehensive records management plan for the City such as detailed scheduling, set disposition, and imaging requirements/options as well as make recommendations.

Manufacturer:

Model No:

Features Requirements:

List the major features/capabilities that are required. What unique design/performance features does this good or provider of the services have that are essential to your requirements? Provide a brief technical explanation as to why these features are essential. Identify the manufacture/model of your existing equipment, if applicable.

Over the past several years, the Office of the City Clerk Department has used the services of SML, Inc. to provide a Comprehensive Records Management Plan for the City and wishes to retain this company to continue implementing this plan. SML, Inc. has provided definitions of public records, detailed scheduling, set disposition and imaging requirements/options, and made organizational structure recommendations. This Records Management implementation process will continue throughout the next fiscal year to include implementation of the preservation phase of the plan. This includes inventorying of permanent records and acquisition of an electronic content management system to serve as a repository for permanent records and city wide transition to electronic record storage.

Competing Brands Investigated:

Did you consider other goods or providers of services with similar capabilities? Indicate specific brands/models of competitors' products that were investigated and describe why not meet listed Features Requirements. List all contact names and phone numbers for competitors.

The Procurement Division had researched MCCi through NCPA, and although they provide consultant services, they were not comparable to the services provided by SML, Inc.

Brand Name Source:

Is the specific brand/model being recommended for procurement available from more than one source (i.e. more than one dealer or distributor)? If yes, list all ruled out vendors, who were ruled out, and the contact name and phone numbers of those vendors.

No.

Statement of Need:

My department's recommendation for sole source is based upon an objective review of the product/service required and appears to be in the best interest of the City. I know of no interest on my part or personal involvement in any way with this request. No gratuities, favors or compromising action have taken place. Neither has my personal familiarity with products, type of equipment, materials or firms been in deciding influence on my request to sole source this purchase when there are other known suppliers to exist. I have attached pertinent documentation showing what market research was conducted to preclude other items from consideration.

Policy:

Sole sources purchases exceeding \$50,000 require City Commission approval. If in one year or over the life of the contract terms combined, the amount exceeds \$50,000, this execution shall require City Commission approval. A Notification of Intent to Award a Sole Source/Single Source will be posted electronically for at least 7 business days as per Section 287.05(3)(c), Florida Statute as amended from time to time.

Requestor:

Batres, Jaqueline

Date:

10/06/2021

Department Director:

Bowers, Marianne

Date:

11/03/2021

IT Approval:

Date

Procurement Manager:	Jeethan, Linda	Date:	11/09/2021
Finance Director:	Lake, Peta-Gay	Date:	11/10/2021
City Manager:	Brooks, Karen	Date:	11/16/2021



CITY OF COCONUT CREEK

FINANCE AND ADMINISTRATIVE SERVICES
PETA-GAY LAKE, DIRECTOR

4800 WEST COPANS ROAD
COCONUT CREEK, FLORIDA 33063

November 16, 2021

NOTIFICATION OF INTENT TO AWARD A SOLE SOURCE PURCHASE

The City of Coconut Creek, Florida and its City Clerk's Department intend to issue a Sole Source award to SML, Inc. for the procurement of Comprehensive Records Management Plan for the City. Details regarding the intended vendor and product are as follows:

Vendor Information:

Vendor Name: SML, Inc.
Vendor Contact: Matt Daugherty
Address: 6001 North A1A
Suite 8024
City/State/Zip: Vero Beach, FL 32963-8024
Phone: (813) 528-2705

RECEIVED

NOV 16 2021

CITY OF COCONUT CREEK
CITY CLERK DEPARTMENT

Product/Service Specifications: N/A

Manufacturer: SML, Inc. Model No.: N/A
Description: Comprehensive Records Management Plan for the City.

The City of Coconut Creek, Florida requests that prospective vendors provide information regarding their ability to supply the named product. Any vendor who believes that they possess an equal to or better product shall submit a written **Statement of Disagreement** outlining their reasons and concerns in detail along with sufficient documentation to substantiate their claim that their offering meets or exceeds the specifications of the intended product.

Statements of Disagreement shall be received by the Office of the City Clerk, Coconut Creek Government Center, 4800 West Copans Road, Coconut Creek, Florida 33063, on or before **5:00 p.m. EST on Wednesday, November 24, 2021.**

Please be advised that City Hall is closed on Fridays and on holidays observed by the City. Normal business hours are between 7:00 a.m. and 6:00 p.m., Monday through Thursday.

Rodriguez, Gretchen Marie

From: Bizflow
Sent: Monday, November 29, 2021 4:25 PM
To: Batres, Jaqueline
Cc: Rodriguez, Gretchen Marie
Subject: Your Sole Source Justification for SML, Inc. has been Approved

Vendor: SML, Inc.
Amount: 30000