

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 law or rule 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 \$2,500.00 when there are no other sources capable of providing the goods or services except for the one selected.

Single Source Definition:

A source selected for the purchase of goods or service over \$2,500.00 due to the compatibility of equipment, replacement parts, training, warranty, or some other unique purpose even though other sources are available.

General Information:

Date: October 19, 2016 Requestor's Name: Leslie Wallace May
Total Amount: \$24,000.00 Requestor's Title: City Clerk
Requesting Department: City Clerk

Vendor Information:

Vendor Name: SML, Inc.
Vendor Contact: Matt Daugherty, Executive Vice President
Street Address: 6001 North A1A, Suite 8024
City/State/Zip: Vero Beach, FL 32963-8024
Email Address: mattdaugherty@msn.com
Phone: (813) 528-2705 Fax: () -

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 is 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 warranty service
- 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.

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Goods/Services Information:

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 two years, the Office of the City Clerk 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.

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 they do not meet listed Features Requirements. List all contact names and phone numbers for competitors.

The Purchasing Department had researched MCCi through NCPA, and although they have 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, why they were ruled out, and the contact name and phone numbers of those vendors.

No.

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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 conflict of 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 particular brands, types of equipment, materials or firms been a deciding influence on my request to sole source this purchase when there are other known suppliers to exist. I have attached the pertinent documentation showing what market research was conducted to preclude other items from consideration.

Policy:

Sole source purchases exceeding \$25,000 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.

Authorization:

***A minimum of two different individual approval signatures are required.**

Researcher: Leslie Wallace May/Linda Jeethan Date: 2/27/2014

Requestor: Leslie Wallace May Date: 10/19/2016

Department Director: Leslie Wallace May Date: 10/19/16

*Purchasing Manager: M Jeethan Date: 10/19/16

*Finance Director: W Brooks Date: 10/24/14

If Purchase is over \$10,000:

~~City~~ City Manager: W Brooks Date: 10/24/16

PURCHASING USE ONLY:

Advertise Sole Source Notification: Yes No Electronic Posting Date: 11/1/16

Statements of Disagreement Received: Yes No Electronic Removal Date: 11/10/16

FY 2017 SML VISIT DATES

DATE OF VISIT	INVOICE AMOUNT	DATE INVOICE PAID
10/24/2016	\$1,600	
12/7/2016	VISIT CANCELLED	---
2/22/2017, 2/23/2017	\$3,200	
3/22/2017, 3/23/2017	\$3,200	
5/2/2017, 5/3/2017, 5/4/2017	\$4,800	
6/7/2017, 6/8/2017	\$3,200	
8/21/2017, 8/22/2017	\$3,200	
9/5/2017, 9/6/2017	\$3,200	
TBD (1 DAY)	\$1,600	
	TOTAL=	
	\$24,000	