

University of North Carolina at Chapel Hill
Guidelines for Writing Sole Source/Brand Specific Justifications

1. **PURPOSE:** State law requires the University to obtain competition for purchases whenever possible. For this reason, we try to use performance based specifications to describe what we intend to purchase. Except for small order purchases and products which are currently on State Term Contracts, when our requirements can only be met by a specific product or vendor, we must have documentation in our purchasing files to show a rationale for not obtaining full and open competition. This "sole source" or "brand specific" justification must accompany the requisition which is sent to the University's Purchasing Office.

2. **SOLE SOURCE JUSTIFICATIONS:** A sole source procurement is authorized when there is only one source available for the goods or services required. The justification should include the following:
 - a. Equipment/service you wish to purchase and why.
 - b. When specific features are vital to support research work, please state the technical specifications that make the equipment unique.
 - c. When standardization/compatibility is the overriding consideration, please state what equipment you are currently using and explain rationale to maintain compatibility.
 - d. Name of suggested supplier.

3. **BRAND SPECIFIC JUSTIFICATIONS:** A brand specific procurement is authorized when a requirement can only be met by the exact specifications offered by a particular piece of equipment made by a manufacturer. The justification should include the following:
 - a. Brand of equipment you wish to purchase and why it is singularly able to meet your needs and no other brand can do so.
 - b. When specific features are vital to support research work, please state the technical specifications that make the brand unique.
 - c. When standardization/compatibility is the overriding consideration, please state the brand of equipment you are currently using and explain rationale to maintain compatibility.
 - d. Names of sources that distribute that particular brand of equipment.

EXAMPLES OF JUSTIFICATIONS:**Sole Source Justification:**

We wish to purchase a mass spectrometer with a probe length of 11.3", which is the longest probe available. The probe length and its large acceptance angle are two critical specifications required for my research. This is the only product that has the features necessary to support my research work. No other probes come close to meeting these requirements. Quintronix is the manufacturer and the only company from which this probe is available.

Brand Specific Justification:

We wish to purchase a RADVision L2W-323 multimedia gateway to match our existing equipment. We already have a RADVision control infrastructure in place for existing similar gateways, gatekeepers and multipoint control units and require a new gateway that will integrate seamlessly with that environment. The PRI interface of this unit is necessary to achieve the call density required for our application. Therefore, RADVision is the only brand that will be acceptable for our needs.