

COUNTY OF SONOMA
PURCHASING DIVISION

SINGLE OR SOLE SOURCE WAIVER REQUEST

Directions: Use this form to justify a single or sole source transaction (see selection criteria below). Departments are encouraged to consult with the Purchasing Division prior to submitting this request to Purchasing. The single or sole source request should be approved before the department makes a commitment to the supplier, and before funds are encumbered. If the request is denied, the department will be advised by the Purchasing Division as to next steps (e.g., conduct a competitive process to select the supplier/contractor).

Choose one below:

☒ **Sole Source** – Services or Goods are available from only one supplier (e.g., proprietary software, licensed or patented good or service).

☐ **Single Source** – More than one source exists (selecting one supplier out of all that are available). The County selects a particular provider over others for reasons such as (1) safety, (2) training or standardization, (3) logistical requirements (e.g. local presence needed) (4) only one prospective supplier is willing to enter into an agreement with the County (5) item has design and/or performance features that are essential to the department and no other source satisfies the County's requirements.

Department: Auditor-Controller-Treasurer-Tax Collector

Date Submitted: June 27, 2019

Contact: Blane Jolliff

Phone: 565-8322

Supplier Name: Bluemont LLC (Kunal Kapoor)

Contract: Other

Amount: \$ 1,425,000 over 5 years EST. Requisition #/Name of Contract: _____

Describe the product or service:

Technical support service engagement to the County of Sonoma Enterprise Financial System Support Organization including delivery related to configurations. Application development. Expertise, advice, analytical support, database/system administration, documentation, troubleshooting and knowledge transfer and training related to work being performed.

Describe the basis for your sourcing recommendation. Include what due diligence you have performed in selecting the supplier. Explain why this is the only product or service that will meet the County's needs. Why is this supplier or contractor the one that can provide the services or products? What steps were taken to verify that the goods or services are not available from another source? Explain what efforts were made to obtain the best possible cost (e.g., current benchmark data from industry, other agencies)

The skill set and specific knowledge that Kunal possesses is absolutely unique, and of vital importance, to the County and the ongoing support of the Enterprise Financial System (EFS). Kunal possesses extensive knowledge and expertise as to all aspects of the software applications that comprise EFS. Additionally, Kunal has obtained vast understanding of County policies, practices and processes through his active and critical involvement throughout the initial two phase implementation, subsequent software upgrade, and two annual catch up events. While others may be able to match Kunal's application knowledge and/or his level of understanding of County practices and processes, Kunal is uniquely qualified in his understanding of how EFS applications are configured and customized to address County practices and processes. No one else is remotely qualified, or trained, too effectively and efficiently serve in Kunal's current role. As the knowledge and skills possessed by Kunal are of vital importance to the EFS Support Organization, high priority is being given to knowledge transfer and training under the scope of services to be performed.

Department Head or Designee Signature: _____

Date: 7/25/19

Single/Sole Source Approved: ☒

Single/Sole Source Denied: ☐

Reason for Determination

KUNAL'S UNDERSTANDING OF THE CUSTOMIZATION & CONFIGURATION OF PEOPLESOFT FOR THE COUNTY OF SONOMA IS UNIQUE & REQUIRES TRANSFER OF KNOWLEDGE & TRAINING FOR EFS SUPPORT LONG-TERM STAFF.

Purchasing Staff: _____

Date: 7-30-19

Revision C

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