

# ATTACHMENT

## JUSTIFICATION FOR SOLE SOURCE AND/OR WAIVER PURCHASE

REQUISITION NUMBER \_\_\_\_\_ DATE July 13, 2012

DEPARTMENT Solid Waste BUSINESS UNIT \_\_\_\_\_

SUGGESTED VENDOR

Kelly Tractor Vendor #272765

ITEM DESCRIPTION AND REASON FOR SOLE SOURCE AND/OR WAIVER:  
(MAY ALSO BE ATTACHED AS A MEMO)

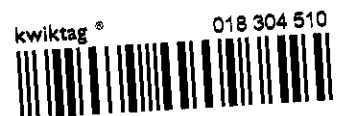
Purchase of CATERPILLAR repair parts and equipment maintenance and repair services from the only authorized dealer of CATERPILLAR parts and service in Lee County. Kelly Tractor utilizes CATERPILLAR proprietary software which is necessary for diagnosing computer and advanced technical/mechanical problems.

TECHNICAL CHARACTERISTICS:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

REASON FOR REQUESTING SOLE SOURCE:

- ITEM MUST MATCH EXISTING EQUIPMENT, WHICH IS:  
\_\_\_\_\_
- ITEM IS A REPAIR PART FOR EXISTING EQUIPMENT, WHICH IS:  
CATERPILLAR heavy construction equipment; e.g. wheel loaders
- ITEM IS TO BE ATTACHED TO EXISTING ITEM, WHICH IS:  
\_\_\_\_\_



TECHNICAL CHARACTERISTICS OF REQUESTED ITEM ARE ESSENTIAL TO OUR NEEDS  
BECAUSE: \_\_\_\_\_

NO OTHER MANUFACTURER OF THIS TYPE OF PRODUCT EXISTS

OTHER MANUFACTURERS OF THIS TYPE OF PRODUCT DO NOT MEET OUR MINIMUM  
REQUIREMENTS:

MANUFACTURER'S NAME: \_\_\_\_\_

REASON: \_\_\_\_\_

MANUFACTURER'S NAME: \_\_\_\_\_

REASON: \_\_\_\_\_

MANUFACTURER'S NAME: \_\_\_\_\_

REASON: \_\_\_\_\_

OTHER \_\_\_\_\_

MUST PERFORM PRICE OR COST ANALYSIS OR ATTACH NEGOTIATED PRICE QUOTE FROM VENDOR;  
LETTER FROM MANUFACTURER STATING SOLE SOURCE.

A) PRICE ANALYSIS PERFORMED

BASED ON:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

B) COST ANALYSIS PERFORMED:

BASED ON:

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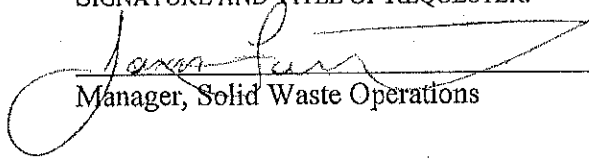
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SIGNATURE AND TITLE OF REQUESTER:

  
\_\_\_\_\_  
Manager, Solid Waste Operations

I, Chris Felicit AUTHORIZED BUYER,  
CONCLUDE THE FOLLOWING:

- SOLE SOURCE JUSTIFICATION IS ADEQUATE AND PURCHASE IS AUTHORIZED WITHOUT COMPETITIVE BIDDING.
- SOLE SOURCE JUSTIFICATION IS INADEQUATE AND REQUISITION IS RETURNED TO DEPARTMENT.
- DUE TO TIME RESTRAINTS PURCHASE IS AUTHORIZED WITHOUT COMPETITIVE BIDDING.
- COMPETITIVE/NON-COMPETITIVE BID WAIVER APPROVED.

Chris Felicit 7/22/12   
Buyer Purchasing Director

# ATTACHMENT



Lee County  
SOUTHWEST FLORIDA

INTEROFFICE MEMORANDUM  
FROM  
SOLID WASTE DIVISION  
Phone: (239) 533-8000 Fax: (239) 338-3337

Date: July 13, 2012

TO: Robert Franceschini  
Director, Procurement Management

From: Jason Fournier  
Operations Manager 

**SUBJECT: Kelly Tractor Sole Source Purchasing Waiver**

As discussed, the solid Waste Division is requesting your consideration in approving a sole source waiver for the purchase of repair parts, equipment maintenance, and repairs to CATERPILLAR brand equipment. Attached is a copy of the completed waiver justification document and letter, from CATERPILLAR Inc., confirming Kelly Tractor is the only authorized dealer in Lee County.

Please contact me if you have any questions or concerns with this request.

Cc. Lindsey J. Sampson, Director Solid Waste

Vendor Summary by Amount

Vendor Number		272765 KELLY TRACTOR COMPANY					Amount	Amount	Amount
Order Number	Or Ty	Branch Plant	Order Date	Bid/Quote Number Description	Payment Remark	Ordered	Received	Open	
401366	OP	SOLWASOR	10/1/2011		PARTS/SOLID WASTE	18,000.00	8,710.54	9,289.46	
401366	OP	SOLWASOR	10/1/2011		PARTS/SOLID WASTE	30,000.00	12,088.50	17,911.50	
401366	OP	SOLWASOR	10/1/2011		PARTS/SOLID WASTE	300.00		300.00	
					<b>Total</b>	48,300.00	20,799.04	27,500.96	
					<b>Grand Total</b>	48,300.00	20,799.04	27,500.96	

7/11/12

JASOR obtaining sole source letter from CAT.

- ① CAT sole source letter
- ② Sole source form Purchaser Manual